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## Resident Travel in Montana

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# Resident Travel in Montana

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## Full Year Analysis

Kara Grau, Norma Polovitz Nickerson, Jeremy Sage, Megan Schultz

6/30/2018



Montana residents took 13,547,000 day trips spending \$1,662,620,000 and 4,013,000 overnight trips spending \$1,206,970,000 for a total of nearly \$2.87 billion on travel in Montana.

## **Resident Travel in Montana**

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## Abstract

The purpose of the study was to estimate annual resident travel within Montana, the spending volume of resident visitors to counties outside their residence (50 miles or more away from home), and to map the flow of resident travel within Montana. Montana residents took 13,547,000 day trips spending \$1,662,620,000 and 4,013,000 overnight trips spending \$1,206,970,000 for a total of nearly \$2.87 billion on travel in Montana.

## Executive Summary

Travel within Montana by residents, or intrastate travel, is a big contributor to the overall travel industry in the state. This report represents a year-long data collection of resident travel behaviors, spending, and trip activities.

During the 2017 calendar year, the Institute for Tourism and Recreation Research (ITRR) intercepted an average of 900 Montana residents during the first week of each month to inquire about the previous month's travel of 50 miles or more away from home. With the 10,795 total sample size to represent the population of trips and spending, we estimate that residents traveled for day trips over 13.5 million times and slightly over 4 million overnight trips within the state. Those trips allowed dollars to spread beyond their county, resulting in nearly \$2.87 billion in spending statewide.

Day trips represented more than three times the number of overnight trips, and subsequently more total dollars are spent due to day trips (\$1.66 billion in day trips; \$1.21 billion in overnight trips).

Business day trips and leisure overnight trips have the highest spending of all trip types. Business trips contribute \$1.36 billion to travel spending. Leisure trips contribute \$1.13 billion to the economy while other types of trips such as medical, shopping, and so forth, contribute \$374 million.

Quarter 4 was the highest travel spending quarter for all types of day trips, while for overnight trips, business and leisure trip spending were highest in quarter 3, and other types of trips were highest in quarter 1.

ES Table 1: Resident trip spending by quarter and trip type

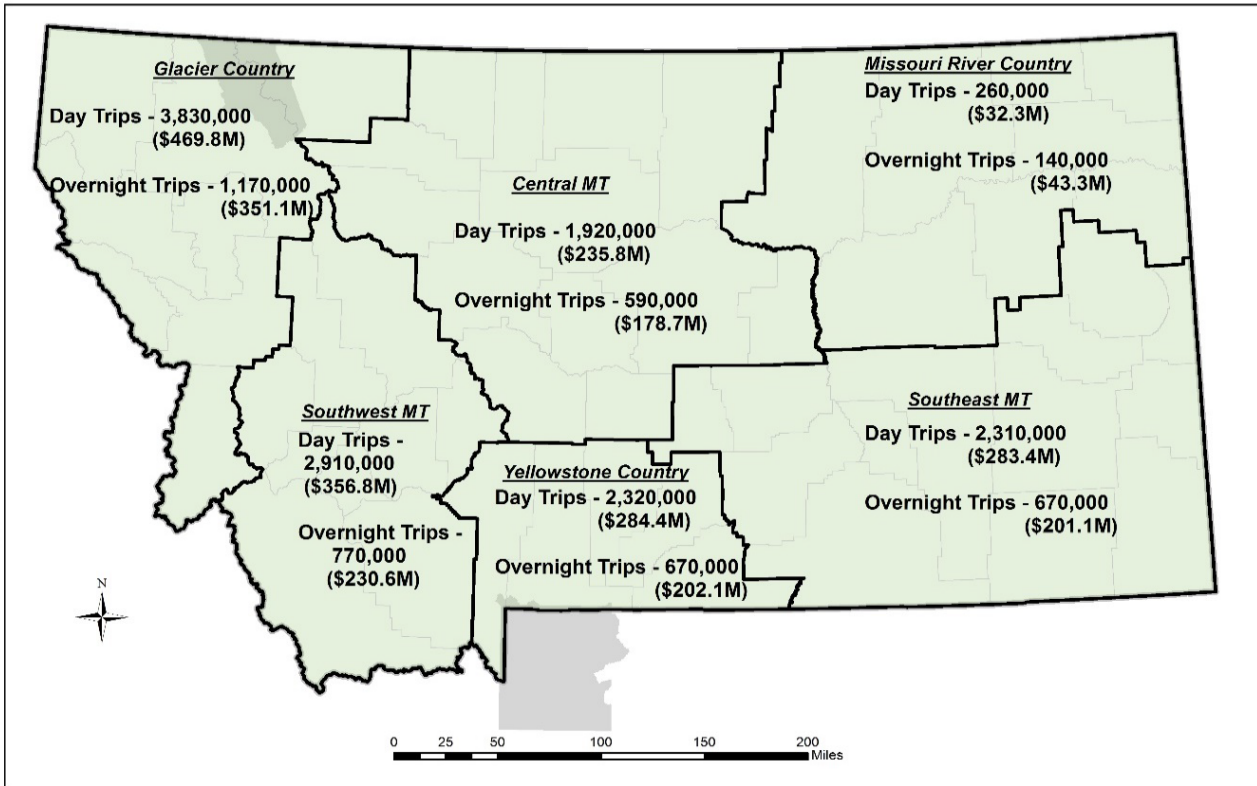
| Quarter <sup>1</sup>                                 | Group Day Trips      |                      |                      | Group Overnight Trips                                      |                      |                     |
|--|----------------------|----------------------|----------------------|--|----------------------|---------------------|
|  | Business             | Leisure/VFR          | Other                | Business   | Leisure/VFR          | Other               |
| <b>Q1</b>  | \$170,150,000        | \$138,420,000        | \$76,020,000         | \$149,900,000  | \$129,000,000        | \$18,630,000        |
| <b>Q2</b>  | \$217,410,000        | \$86,970,000         | \$73,930,000         | \$137,240,000  | \$163,280,000        | \$10,230,000        |
| <b>Q3</b>  | \$114,660,000        | \$128,010,000        | \$68,760,000         | \$152,040,000  | \$179,510,000        | \$7,740,000         |
| <b>Q4</b>  | \$303,160,000        | \$182,150,000        | \$102,980,000        | \$116,180,000  | \$127,060,000        | \$16,150,000        |
| <b>Total</b>   | <b>\$805,380,000</b> | <b>\$535,550,000</b> | <b>\$321,690,000</b> | <b>\$555,360,000</b>                                       | <b>\$598,860,000</b> | <b>\$52,750,000</b> |
| <b>Total day trip spending =<br/>\$1,662,620,000</b> |                      |                      |                      | <b>Total overnight trip spending =<br/>\$1,206,970,000</b> |                      |                     |

<sup>1</sup> Q1=January-March; Q2=April-June; Q3=July-September; Q4=October-December.



The highest percent of all travel dollars were expended in Glacier and Southwest Montana travel regions, as they represent 50% of all resident day trip and 48% of all overnight travel dollars.

ES Figure 1: Trip numbers and dollars spent within each travel region



At the county level, overnight trips and spending by county indicates that Yellowstone County receives both the largest number (526,400 overnights) and the highest dollars spent in that county (\$158,947,000) compared with all other counties. Missoula County, with 503,900 overnight trips and \$153,976,000 in spending, is the next highest, followed by Gallatin and Lewis & Clark Counties.

County origin of residents to other counties reflects the Montana population. The most populated counties (Yellowstone, Missoula, Cascade, Gallatin, Lewis & Clark, and Flathead) represent the highest percent of visitation to all other counties.

Other than scenic driving, day hiking, and wildlife watching, city-type activities tended to top the list with recreational shopping in Yellowstone County (Billings), special dining out in Missoula, Gallatin, Lewis & Clark, Flathead, and Cascade Counties (Missoula, Bozeman, Helena, Kalispell-Whitefish-Big Fork, and Great Falls). Local breweries were a draw to each of the top counties/communities with 11% to 23% of travelers tasting the brews. Finally, events such as attending or participating in a sporting event (5-15%), festivals or special events (9-14%), and family events (5-15%) were typical draws for travelers to other counties.

Including both resident and nonresident travel spending, total travel industry spending in Montana is \$6.23 billion dollars; 54 percent contributed by nonresidents and 46 percent by resident travel within the state.

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## Introduction

Montanans love Montana. We play hard within our state. We travel to visit relatives and friends. We travel within the state for work, events, medical, and shopping.

While nonresidents play here and drop billions of dollars in our state as well<sup>2</sup>, the contribution of residents traveling within Montana provides an impact simply because we stay local - our money stays in-state. In fact, a study of intrastate travel in New South Wales, Australia, found the greatest gains in gross state product and employment were associated with an increase in intrastate tourism in which the additional expenditure replaces what would otherwise have been spent out of state.<sup>3</sup>

Another benefit of intrastate tourism is the idea behind staycations that are both more sustainable for the environment (less travel/less emissions) and provide an opportunity to learn about one's own backyard. According to a study on proximity destination, or staycation, the resident takes the role of a 'tourist' in viewing their own area. This approach of proximity tourism constitutes a way to enhance familiar places and develop tourism in an environmentally concerned context where proximate destinations are being promoted.<sup>4</sup>

Intrastate travel is not a new phenomenon. It happens all the time. What is less clear is the effect it has on Montana's business climate and economy and where that contribution is occurring. This study was conducted to determine the types of travel, activities, and spending of resident travel within Montana and its contribution to regions and counties.

## Purpose

The purpose of the study was to estimate annual resident travel within Montana, the spending by resident visitors to counties outside their residence (50 miles or more away from home), and to map the flow of resident travel within Montana.

## Objectives

- To assess the spread of spending and amount of spending throughout Montana due to resident travel.
- To map travel patterns and destinations within Montana by residents.
- To identify purposes for travel within Montana.
- To compare spending by purpose of travel.
- To determine the annual estimate of resident travel days in Montana, both overnight trips and day trips within Montana.

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<sup>2</sup> [https://scholarworks.umt.edu/itrr\\_pubs/367/](https://scholarworks.umt.edu/itrr_pubs/367/)

<sup>3</sup> Dwyer, L. et.al., 2003. Tourism's contribution to a state economy: a multi-regional general equilibrium analysis, *Tourism Economics*, 9 (4), 431-448.

<sup>4</sup> Diaz-Soria, I. 2017. Being a tourist as a chosen experience in a proximity destination. *Tourism Geographies*, 19 (1), 96-117

## Methods

The method to collect data was consistent with the nonresident data collection of the Institute for Tourism and Recreation Research (ITRR).<sup>5</sup> In this resident study, ten surveyors strategically scattered around Montana intercepted residents at gas stations and a limited number of rest areas the first seven days of every month for a year (2017).

Residents were interviewed as they filled their fuel tank. Ten main questions regarding travel 50 miles or more away from home, some with additional probes, were asked of each resident. Following those questions, a postage-paid mail back survey was given to willing residents to assess more detail about their travel behavior, routes, and spending.

## Survey Design

The two methods of data collection, interviews and mail back survey, required two different survey instruments. The gas station interview survey was designed to assess the total population of resident travel at least 50 miles from home in Montana. Residents were asked to recall the number of day and overnight business trips in the past month; day and overnight vacation, recreation, and trips visiting friends and relatives in the past month (leisure trips); and any other type of day and overnight trips taken in the past month. See Appendix A for this front end interview survey.

The mail back survey was given to all intercepted residents who had traveled at least 50 miles from home in the last 30 days and who agreed to provide further information on their travels. This survey was designed to probe the resident about the most recent trip they took in the past month that was 50 miles or more away from home. Residents were asked to draw their route, provide spending (at home, en route, and at the destination) in six different categories, accommodation type and town, month of the travel, purpose of trip, group size, activities, and demographics. See Appendix B for the mail back survey.

An incentive for residents to complete the mail back survey was a monthly drawing of a \$100 Visa card and a final grand prize drawing for a \$1,000 Visa card. Only those who mailed back their completed surveys were entered into the drawing.

## Response Rates

In total, 12,551 residents were approached. There were 1,756 refusals, resulting in an on-site response rate of 86%. Of the 10,795 who agreed to participate in the survey, 677 were not eligible to continue with the survey because they had not traveled 50 or more miles from home within the last year. Those 10,118 respondents who completed the on-site survey were also asked to take a more extensive survey with them to complete and mail back (or complete online). There were 1,623 respondents who refused the mail-back survey, therefore 8,495 mail back surveys were handed out; 1,341 were returned. This resulted in a 16 percent response rate for the mail back survey.

## Weighting and Adjustments

The front end interview trip totals were used as a representative sample of Montana's population of adult drivers, age 18 and older. These data were weighted by county population and gender to derive the total number of all trips taken by Montanans in the year.

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<sup>5</sup> See <http://itrr.umt.edu/files/NonresTravelSurvey-Methods-Analysis.pdf> for full discussion.

Expenditure data gathered in the mail back survey represented the most recent trip of the respondents. Six categories (gasoline, lodging/camping, restaurants and bars, groceries/snacks, retail goods, services) and three time frames (at home, en route, and at the destination) were assessed.<sup>6</sup> Any expenditures (outliers) within a category above the cutoff amount, defined as three standard deviations plus the mean, was reduced to that cutoff amount. The mean for each delimited expenditure category was calculated, resulting in the average spending per trip. An adjustment was made to reduce the mean calculated for the accommodations categories based on bed tax collections. Adding together the means for each expenditure category resulted in the average spending per trip. This figure is used in combination with the estimate of total trips within the state to determine the total amount of resident travel spending in Montana.

## Limitations

This study was limited to Montana residents who were at a gas station or rest area during the study year on our sampling days. We assumed that nearly all Montanans who travel 50 miles or more away from home had an equal chance of being intercepted. Additional limitations and assumptions include:

- We assume that residents reported their most recent trip. However, as in similar studies, people want to tell you about their most recent 'exciting' trip, not the most recent trip. Therefore, it is possible that day trip and business trip sample sizes are slightly underrepresented.
- We assume that residents were able to accurately recall their spending on their most recent trip.
- Because the mail back survey sample size was small (1,341) we were limited in the number of detailed trip descriptions to only six counties and the six travel regions.
- This study was limited to trips by adults 18 years and older. It does not cover minors with driver's licenses and their trips.
- This study collected data at gas stations proximate to interstate highways or other high traffic areas. It is possible, therefore, that non-travelers are underrepresented in the sample.
- This study was limited to intercepting residents at gas stations and rest areas in 60 different communities throughout Montana.
- This study was limited to gas stations who gave ITRR permission to contact resident customers.

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<sup>6</sup> This report concerns only spending away from home. As such, spending at home is not reported.

## Results

Respondents for this study represented every county in the state (see Appendix C for counts and percent of respondents per county of residence). On average, surveyors intercepted 900 residents per month with the low being 721 in December and the high of 1,096 in January. Responses by quarter were nearly even (Table 1).

Table 1: Responses by month

| Month            | Frequency    | Percent      | Month            | Frequency    | Percent      |
|------------------|--------------|--------------|------------------|--------------|--------------|
| January          | 1,096        | 10.2%        | July             | 948          | 8.8%         |
| February         | 905          | 8.4%         | August           | 869          | 8.0%         |
| March            | 1,018        | 9.4%         | September        | 708          | 6.6%         |
| <b>Quarter 1</b> | <b>3,019</b> | <b>28.0%</b> | <b>Quarter 3</b> | <b>2,524</b> | <b>23.4%</b> |
| April            | 902          | 8.4%         | October          | 818          | 7.6%         |
| May              | 954          | 8.8%         | November         | 923          | 8.6%         |
| June             | 929          | 8.6%         | December         | 721          | 6.7%         |
| <b>Quarter 2</b> | <b>2,785</b> | <b>25.8%</b> | <b>Quarter 4</b> | <b>2,462</b> | <b>22.8%</b> |

## Statewide Results

Residents participated in over 13.5 million day trips 50 miles from home in a 12-month period, and just over 4 million overnight trips in the same time period (Table 2).

Table 2: Number of group trips per quarter and trip type

| Quarter                             | Group Day Trips  |                  |                  | Group Overnight Trips                    |                  |                |
|-------------------------------------|------------------|------------------|------------------|--|------------------|----------------|
|                                     | Business         | Leisure/VFR*     | Other            | Business                                 | Leisure/VFR      | Other          |
| <b>Q1</b>                           | 1,799,000        | 1,083,000        | 230,000          | 439,000                                  | 414,000          | 33,000         |
| <b>Q2</b>                           | 2,036,000        | 1,057,000        | 306,000          | 494,000                                  | 626,000          | 39,000         |
| <b>Q3</b>                           | 1,253,000        | 1,444,000        | 264,000          | 383,000                                  | 609,000          | 25,000         |
| <b>Q4</b>                           | 2,322,000        | 1,413,000        | 339,000          | 386,000                                  | 532,000          | 32,000         |
| <b>Total</b>                        | <b>7,410,000</b> | <b>4,997,000</b> | <b>1,139,000</b> | <b>1,702,000</b>                         | <b>2,181,000</b> | <b>129,000</b> |
| <b>Total day trips = 13,546,000</b> |                  |                  |                  | <b>Total overnight trips = 4,012,000</b> |                  |                |

\*VFR = Visiting friends and relatives.

# Resident Travel in Montana | 2018

Spending by residents for intrastate travel shows that day trips generate higher dollars than overnight trips due to the large number of day trips compared to overnight. The 13.5 million day trips 50 miles or more away from home generated \$1.66 billion, while the 4 million overnights trips generated \$1.21 billion dollars (Table 3).

**Table 3: Trip spending per quarter and trip type**

| Quarter  | Group Day Trips      |                      |                      | Group Overnight Trips                                      |                      |                     |
|--|----------------------|----------------------|----------------------|--|----------------------|---------------------|
|  | Business             | Leisure/VFR          | Other                | Business   | Leisure/VFR          | Other               |
| <b>Q1</b>  | \$170,150,000        | \$138,420,000        | \$76,020,000         | \$149,900,000  | \$129,000,000        | \$18,630,000        |
| <b>Q2</b>  | \$217,410,000        | \$86,970,000         | \$73,930,000         | \$137,240,000  | \$163,280,000        | \$10,230,000        |
| <b>Q3</b>  | \$114,660,000        | \$128,010,000        | \$68,760,000         | \$152,040,000  | \$179,510,000        | \$7,740,000         |
| <b>Q4</b>  | \$303,160,000        | \$182,150,000        | \$102,980,000        | \$116,180,000  | \$127,060,000        | \$16,150,000        |
| <b>Total</b>   | <b>\$805,380,000</b> | <b>\$535,550,000</b> | <b>\$321,690,000</b> | <b>\$555,360,000</b>                                       | <b>\$598,860,000</b> | <b>\$52,750,000</b> |
| <b>Total day trip spending =<br/>\$1,662,620,000</b> |                      |                      |                      | <b>Total overnight trip spending =<br/>\$1,206,970,000</b> |                      |                     |

Residents on day trips spent most on fuel (\$492.3 million), followed by what they spent on retail (\$474.8 million). Those on overnight trips spent the largest portion of their budget on restaurants and bars (\$371.5 million), and fuel (\$273.8 million) (Table 4).

**Table 4: 2017 trip spending per category by day and overnight travelers**

| Category                                | Day Trips              | Overnight Trips        |
|---|------------------------|------------------------|
| <b>Fuel</b>                             | \$492,343,000          | \$273,797,000          |
| <b>Lodging, Camping</b>                 | \$0                    | \$188,244,000          |
| <b>Restaurants, bars</b>                | \$288,990,000          | \$371,494,000          |
| <b>Groceries</b>                        | \$262,342,000          | \$116,652,000          |
| <b>Retail goods</b>                     | \$474,849,000          | \$184,793,000          |
| <b>Service (fees, admissions, etc.)</b> | \$144,093,000          | \$71,990,000           |
| <b>Total trip spending =</b>            | <b>\$1,662,620,000</b> | <b>\$1,206,970,000</b> |

Average spending by residents on day trips was highest for “other” trip types (\$202.10), with spending on retail and groceries making up the bulk of what those travelers spend in a day. Average spending per overnight trip is also highest among those traveling for “other” purposes (\$371.66), with retail, again, being the highest spending category (Table 5).



**Table 5: 2017 average spending per day trip by category**

| Category                          | Group Day Trips |                |                 |                 |
|-----------------------------------|-----------------|----------------|-----------------|-----------------|
|                                   | Business        | Leisure/VFR    | Other           | Total           |
| Fuel                              | \$31.44         | \$37.74        | \$36.51         | \$36.34         |
| Lodging, Camping                  | --              | --             | --              | --              |
| Restaurant, bar                   | \$12.74         | \$24.32        | \$23.14         | \$21.33         |
| Groceries                         | \$9.62          | \$11.72        | \$42.29         | \$19.37         |
| Retail goods                      | \$26.97         | \$9.34         | \$82.45         | \$35.05         |
| Services (fees, admissions, etc.) | \$22.83         | \$4.36         | \$17.72         | \$10.64         |
| <b>Total</b>                      | <b>\$103.60</b> | <b>\$87.48</b> | <b>\$202.10</b> | <b>\$122.73</b> |

Among overnight travelers, those on business trips had the longest average trip length (3.17 nights away from home, but in Montana), almost a full night longer than the average length of “other” trips (2.21 nights) (Table 6).

**Table 6: 2017 average spending per overnight trip by category**

| Category                                 | Group Overnight Trips |                 |                 |                 |
|--|-----------------------|-----------------|-----------------|-----------------|
|  | Business              | Leisure/VFR     | Other           | Total           |
| <b>Avg. nights away from home, in MT</b> | <b>3.17</b>           | <b>2.65</b>     | <b>2.21</b>     | <b>2.69</b>     |
| Fuel                                     | \$75.13               | \$68.72         | \$51.92         | \$68.23         |
| Lodging, Camping                         | \$80.62               | \$38.41         | \$48.44         | \$46.91         |
| Restaurant, bar                          | \$125.89              | \$86.40         | \$94.16         | \$92.58         |
| Groceries                                | \$32.37               | \$28.89         | \$31.87         | \$29.07         |
| Retail goods                             | \$43.21               | \$38.05         | \$138.88        | \$46.05         |
| Services (fees, admissions, etc.)        | \$10.34               | \$20.63         | \$6.39          | \$17.94         |
| <b>Total</b>                             | <b>\$367.56</b>       | <b>\$281.11</b> | <b>\$371.66</b> | <b>\$300.78</b> |

Where residents spend nights within Montana is shown in Figures 1-4. Figure 1 represents all trips throughout the state based on total nights spent in the location (rather than the number of trips there). Figures 2-4 show where residents travel overnight for business, leisure/VFR, and other types of trips.

Figure 1: Where MT residents travel to for overnight trips

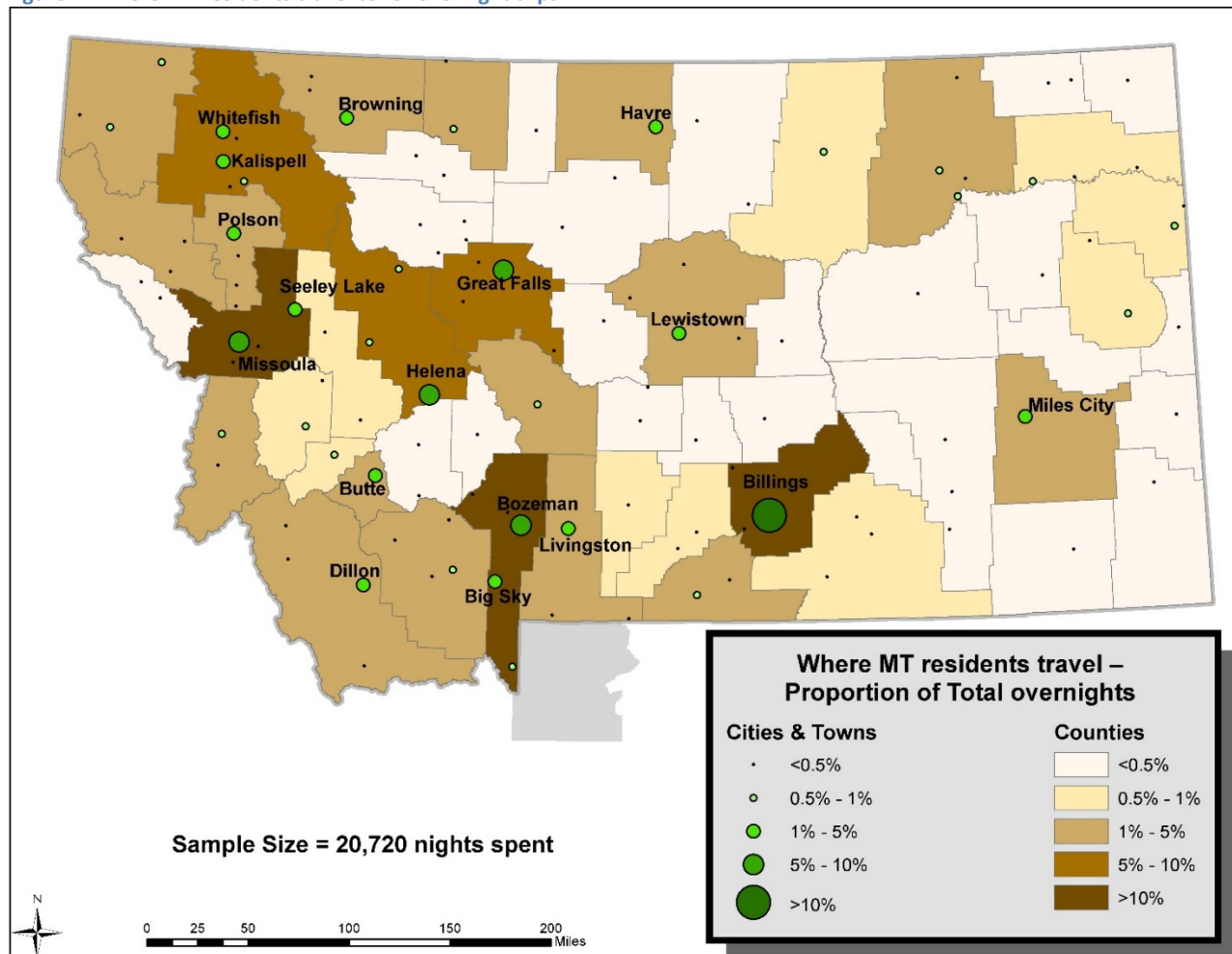


Figure 2: Where MT residents travel to for overnight business trips

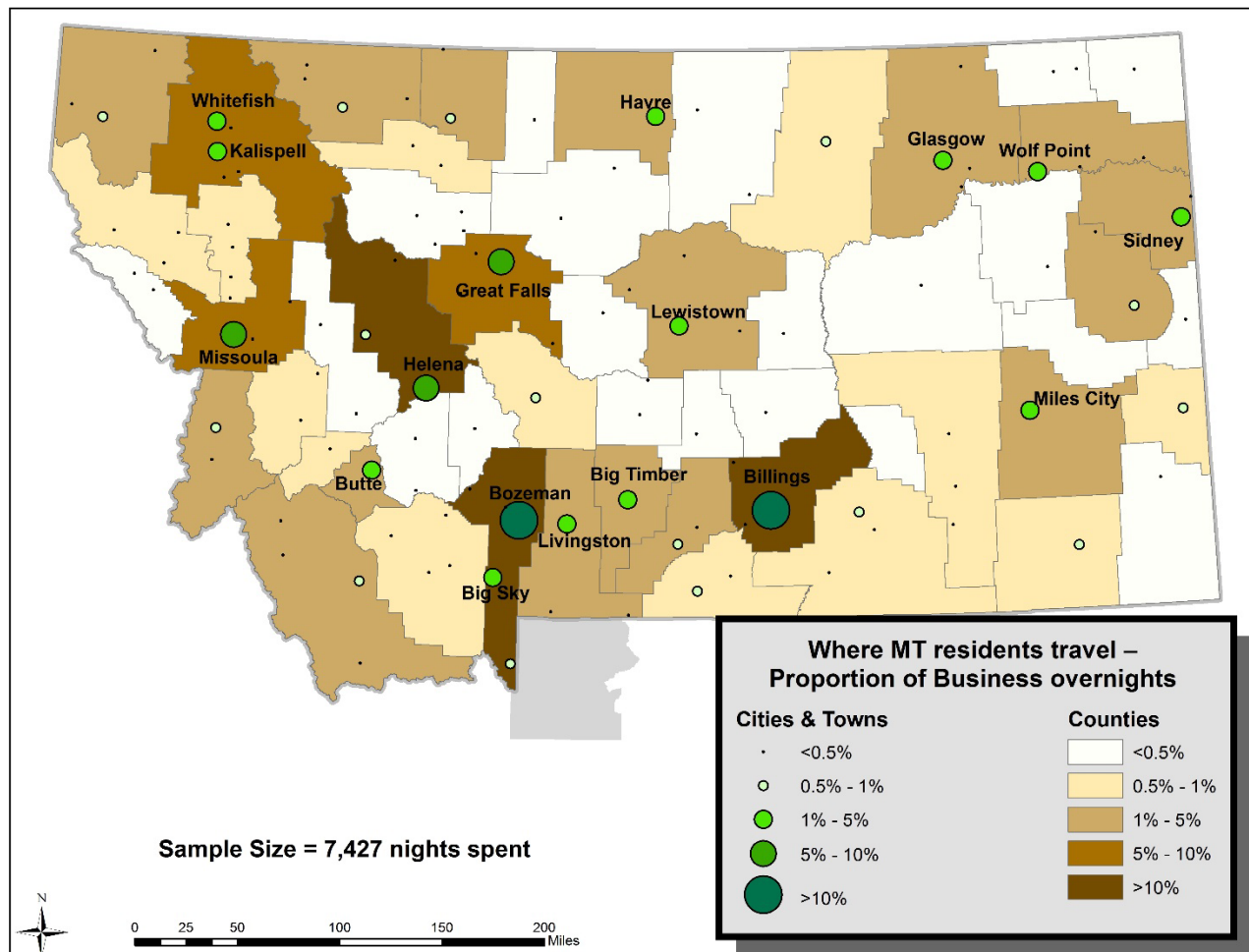


Figure 3: Where MT residents travel to for overnight leisure trips

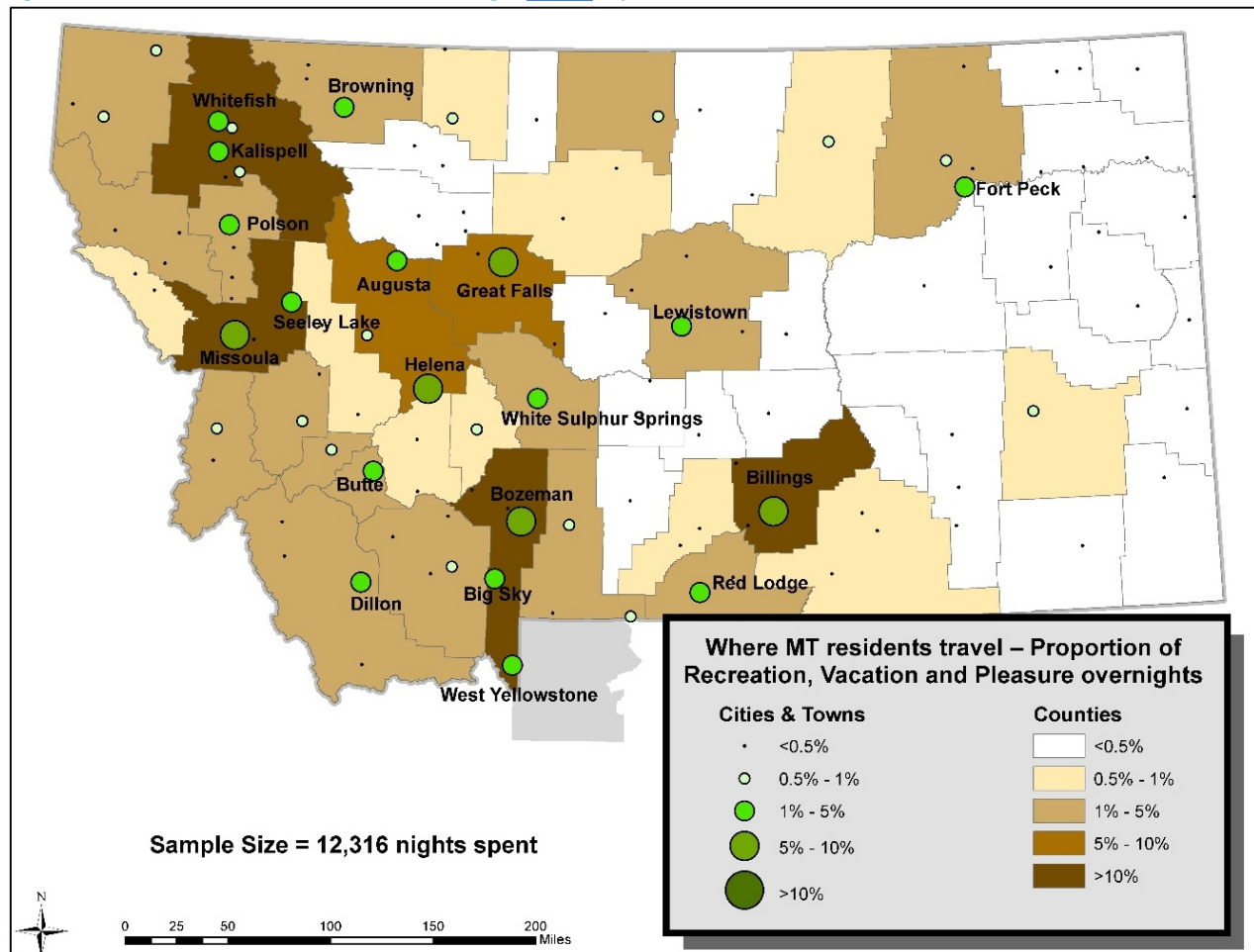
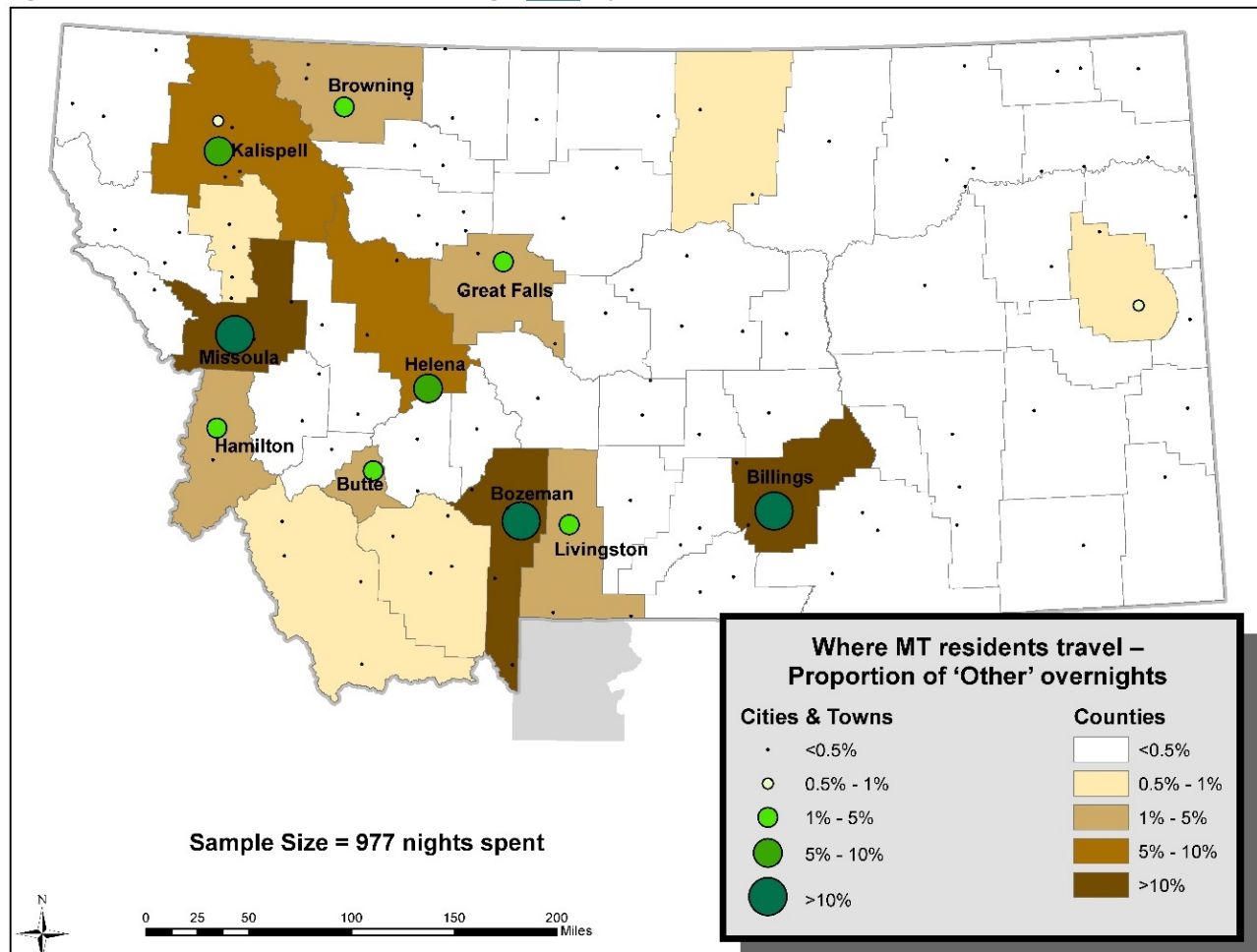


Figure 4: Where MT residents travel to for overnight other trips



## Statewide Leisure Trips

Trip characteristics for residents traveling in-state for vacation, recreation or visiting friends and relatives is provided here and referred to as leisure trips. The average number of adults per leisure trip was 2.17. The average number of children under 18 was 0.52. The average group size was 2.73 for leisure trips. Average age for respondents was 52.4 years of age. Age categories are shown in Table 7.

**Table 7: Percent of respondents within each age category**

| Age   | Percent | Age   | Percent | Age   | Percent |
|-------|---------|-------|---------|-------|---------|
| 18-29 | 9%      | 40-49 | 17%     | 60-69 | 25%     |
| 30-39 | 13%     | 50-59 | 24%     | 70+   | 11%     |

Over 50 percent of residents have a college degree. Household income varies, but about one-fifth of residents responded in each of the categories of \$25K-less than \$50K, \$50K-less than \$75K, and \$75K-less than \$100K. Respondents' level of education and annual household income are displayed in Tables 8 and 9.

**Table 8: Respondent education level**

| Education Level       | Percent | Education Level  | Percent |
|-----------------------|---------|------------------|---------|
| Less than high school | <1%     | Undergrad degree | 34%     |
| High school or GED    | 25%     | Advanced degree  | 21%     |
| Associate/Trade/Cert. | 20%     |                  |         |

**Table 9: Respondent household income (HHI)**

| HHI Level                 | Percent | HHI Level                  | Percent |
|---------------------------|---------|----------------------------|---------|
| Less than \$25,000        | 11%     | \$100K to less than \$150K | 14%     |
| \$25K to less than \$50K  | 22%     | \$150K to less than \$200K | 4%      |
| \$50K to less than \$75K  | 24%     | More than \$200K           | 4%      |
| \$75K to less than \$100K | 21%     |                            |         |

Scenic driving was the activity most participated in by those on leisure trips. This was followed by day hiking, special dining out, wildlife watching and recreational shopping (Table 10).

**Table 10: Statewide leisure trip activity participation**

| Activity              | Percent | Activity            | Percent |
|-----------------------|---------|---------------------|---------|
| Scenic driving        | 35%     | Canoe/kayaking      | 3%      |
| Day hiking            | 19%     | Rafting/floating    | 3%      |
| Special dining out    | 17%     | Performing arts     | 3%      |
| Watching wildlife     | 16%     | Visit Indian Res.   | 3%      |
| Recreational shopping | 16%     | Backpacking         | 2%      |
| Nature photography    | 13%     | Bicycling           | 2%      |
| Family event          | 13%     | Golfing             | 2%      |
| Car/RV camping        | 12%     | Lewis & Clark sites | 2%      |
| Local brewery         | 11%     | Ghost towns         | 2%      |
| Festival/events       | 10%     | Dino attractions    | 2%      |
| Sporting events       | 10%     | Attend wedding      | 2%      |
| Other fishing         | 8%      | Horseback riding    | 1%      |
| Historical sites      | 8%      | Geocaching          | 1%      |
| Hunting               | 6%      | Mt. biking          | 1%      |
| Motor boating         | 6%      | Road/tour biking    | 1%      |
| Farmers market        | 6%      | Rock hounding       | 1%      |
| Museums               | 6%      | Motorcycle tour     | 1%      |
| Visit hot springs     | 5%      | Snowmobile          | 1%      |
| Ski/snowboarding      | 5%      | Snowshoe            | 1%      |
| View art exhibits     | 5%      | Ice fishing         | 1%      |
| Fly fishing           | 4%      | Local distillery    | 1%      |
| Birding               | 3%      | Rock climbing       | <1%     |
| OHV/ATV               | 3%      | XC ski              | <1%     |

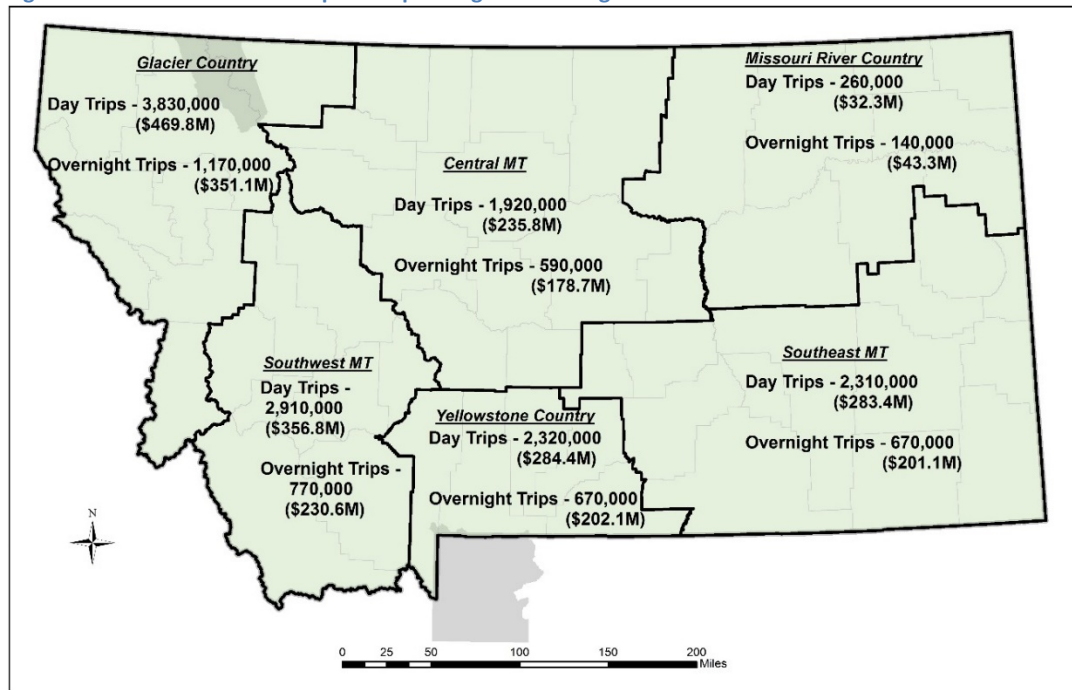
## Regional Results

Looking, again, at travel for all purposes, Glacier Country and Southwest Montana travel region receive the highest number of both day trips and overnight trips of all travel regions (Table 11 and Figure 5).

**Table 11: Resident number of trips and dollars spent by travel region**

|                                 | Total Day Trips to Region | Total Spent by Travelers to Destination within Region | Total Overnight Trips to Region | Total Spent by Travelers to Destination within Region |
|---------------------------------|---------------------------|---|---------------------------------|---|
| <b>Glacier Country</b>          | 3,830,000                 | \$469,800,000   | 1,170,000                       | \$351,135,000   |
| <b>Southwest Montana Region</b> | 2,910,000                 | \$356,830,000   | 770,000                         | \$230,643,000   |
| <b>Central Montana Region</b>   | 1,920,000                 | \$235,830,000   | 590,000                         | \$178,694,000   |
| <b>Yellowstone Country</b>      | 2,320,000                 | \$284,440,000   | 670,000                         | \$202,143,000   |
| <b>Missouri River Country</b>   | 260,000                   | \$32,320,000  | 140,000                         | \$43,290,000  |
| <b>Southeast Montana Region</b> | 2,310,000                 | \$283,400,000   | 670,000                         | \$201,063,000   |
| <b>TOTAL</b>                    | <b>13,550,000</b>         | <b>\$1,662,620,000</b>                                | <b>4,010,000</b>                | <b>\$1,206,970,000</b>                                |

**Figure 5: Number of resident trips and spending to travel regions**



Further details about regional spending by overnight travelers are provided below, including money spent in six different expenditure categories. As shown in Tables 12-17, spending on restaurant/bars and fuel are the highest two categories in each travel region.



## Glacier Country Travel Region

Glacier Country receives 29 percent of resident spending on overnight travel in Montana, and 27 percent of all resident overnights in Montana.

Within the region, the percent of overnights in the counties varies significantly: Flathead 30%; Glacier 7%; Lake 9%; Lincoln 5%; Mineral 1%; Missoula 39%; Ravalli 5%; Sanders 4%.

**Table 12: Overnight spending by visitors to Glacier Country Travel Region**

| Spending en route/in Glacier Country     | En route            | Destination          | Total Travel Spending |
|--|---------------------|----------------------|-----------------------|
| <b>Fuel</b>                              | \$50,947,000        | \$28,707,000         | \$79,654,000          |
| <b>Lodging, camping</b>                  | \$6,061,000         | \$48,703,000         | \$54,764,000          |
| <b>Restaurants, bars</b>                 | \$23,197,000        | \$84,879,000         | \$108,076,000         |
| <b>Groceries</b>                         | \$12,575,000        | \$21,361,000         | \$33,936,000          |
| <b>Retail goods</b>                      | \$5,615,000         | \$48,146,000         | \$53,761,000          |
| <b>Services (fees, admissions, etc.)</b> | \$1,330,000         | \$19,614,000         | \$20,944,000          |
| <b>TOTAL</b>                             | <b>\$99,725,000</b> | <b>\$251,410,000</b> | <b>\$351,135,000</b>  |

## Southwest Montana Travel Region

Southwest Montana travel region receives 19 percent of resident spending in MT and 19 percent of all resident overnights in MT.

Within the region the percent of overnights in the counties is highly varied: Beaverhead 11%; Broadwater 2%; Deer Lodge 5%; Granite 5%; Jefferson 2%; Lewis & Clark 48%; Madison 6%; Powell 3%; Silver Bow 19%.

**Table 13: Overnight spending by visitors to Southwest MT Travel Region**

| Spending en route/in Southwest Montana   | En route            | Destination          | Total Travel Spending |
|--|---------------------|----------------------|-----------------------|
| <b>Fuel</b>                              | \$33,464,000        | \$18,856,000         | \$52,320,000          |
| <b>Lodging, camping</b>                  | \$3,981,000         | \$31,991,000         | \$35,972,000          |
| <b>Restaurants, bars</b>                 | \$15,237,000        | \$55,753,000         | \$70,990,000          |
| <b>Groceries</b>                         | \$8,260,000         | \$14,031,000         | \$22,291,000          |
| <b>Retail goods</b>                      | \$3,688,000         | \$31,625,000         | \$35,313,000          |
| <b>Services (fees, admissions, etc.)</b> | \$874,000           | \$12,883,000         | \$13,757,000          |
| <b>TOTAL</b>                             | <b>\$65,504,000</b> | <b>\$165,139,000</b> | <b>\$230,643,000</b>  |

## Yellowstone Country Travel Region

Yellowstone Country travel region receives 17 percent of resident dollars spent in Montana and 16 percent of all resident overnights in Montana.

Within the region the percent of overnights in the counties is highly skewed toward Gallatin County: Carbon 7%; Gallatin 69%; Park 15%; Stillwater 6%; Sweet Grass 3%.

**Table 14: Overnight spending by visitors to Yellowstone Country Travel Region**

| Spending en route/in Yellowstone Country | En route            | Destination          | Total Travel Spending |
|--|---------------------|----------------------|-----------------------|
| <b>Fuel</b>                              | \$29,329,000        | \$16,526,000         | \$45,855,000          |
| <b>Lodging, camping</b>                  | \$3,490,000         | \$28,038,000         | \$31,528,000          |
| <b>Restaurants, bars</b>                 | \$13,354,000        | \$48,864,000         | \$62,218,000          |
| <b>Groceries</b>                         | \$7,239,000         | \$12,297,000         | \$19,536,000          |
| <b>Retail goods</b>                      | \$3,232,000         | \$27,717,000         | \$30,949,000          |
| <b>Services (fees, admissions, etc.)</b> | \$766,000           | \$11,291,000         | \$12,057,000          |
| <b>TOTAL</b>                             | <b>\$57,410,000</b> | <b>\$144,733,000</b> | <b>\$202,143,000</b>  |

## Central Montana Travel Region

Central Montana travel region receives 15 percent of resident spending in Montana and 15 percent of all resident overnights in MT.

Cascade Country receives half the total number of overnights within the region while the rest of the counties are similar in numbers: Blaine 2%; Cascade 50%; Chouteau 3%; Fergus 10%; Hill 11%; Judith Basin 2%; Liberty 1%; Meagher 7%; Petroleum <1%; Pondera 3%; Teton 2%; Toole 7%; Wheatland 1%.

| Spending en route/in Central Montana     | En route            | Destination          | Total Travel Spending |
|--|---------------------|----------------------|-----------------------|
| <b>Fuel</b>                              | \$25,927,000        | \$14,609,000         | \$40,536,000          |
| <b>Lodging, camping</b>                  | \$3,085,000         | \$24,785,000         | \$27,870,000          |
| <b>Restaurants, bars</b>                 | \$11,805,000        | \$43,195,000         | \$55,000,000          |
| <b>Groceries</b>                         | \$6,400,000         | \$10,871,000         | \$17,271,000          |
| <b>Retail goods</b>                      | \$2,857,000         | \$24,502,000         | \$27,359,000          |
| <b>Services (fees, admissions, etc.)</b> | \$677,000           | \$9,981,000          | \$10,658,000          |
| <b>TOTAL</b>                             | <b>\$50,751,000</b> | <b>\$127,943,000</b> | <b>\$178,694,000</b>  |

## Southeast Montana Travel Region

Southeast Montana travel region receives 17 percent of resident spending in Montana and 16 percent of all resident overnights in MT.

Yellowstone County receives 77 percent of all region overnights followed by: Big Horn 4%; Carter 1%; Custer 6%; Dawson 4%; Fallon 2%; Golden Valley 1%; Musselshell 1%; Powder River 2%; Prairie 1%; Rosebud 3%; Treasure <1%; Wibaux <1%.

**Table 16: Overnight spending by visitors to Southeast MT Travel Region**

| Spending en route/in Southeast Montana   | En route            | Destination          | Total Travel Spending |
|--|---------------------|----------------------|-----------------------|
| <b>Fuel</b>                              | \$29,172,000        | \$16,438,000         | \$45,610,000          |
| <b>Lodging, camping</b>                  | \$3,471,000         | \$27,888,000         | \$31,359,000          |
| <b>Restaurants, bars</b>                 | \$13,283,000        | \$48,602,000         | \$61,885,000          |
| <b>Groceries</b>                         | \$7,201,000         | \$12,232,000         | \$19,433,000          |
| <b>Retail goods</b>                      | \$3,215,000         | \$27,568,000         | \$30,783,000          |
| <b>Services (fees, admissions, etc.)</b> | \$762,000           | \$11,231,000         | \$11,993,000          |
| <b>TOTAL</b>                             | <b>\$57,104,000</b> | <b>\$143,959,000</b> | <b>\$201,063,000</b>  |

## Missouri River Country Travel Region

Missouri River Country Travel Region receives 4 percent of resident spending in Montana and 4 percent of all resident overnights in MT.

Within the region the percent of overnights in the counties is variable: Daniels 2%; Garfield 3%; McCone 3%; Phillips 16%; Richland 18% Roosevelt 19%; Sheridan 8%; Valley 32%.

**Table 17: Overnight spending by visitors to Missouri River Country Travel Region**

| Spending en route/in Missouri River Country | En route            | Destination         | Total Travel Spending |
|---|---------------------|---------------------|-----------------------|
| <b>Fuel</b>                                 | \$6,281,000         | \$3,539,000         | \$9,820,000           |
| <b>Lodging, camping</b>                     | \$747,000           | \$6,004,000         | \$6,751,000           |
| <b>Restaurants, bars</b>                    | \$2,860,000         | \$10,465,000        | \$13,325,000          |
| <b>Groceries</b>                            | \$1,550,000         | \$2,634,000         | \$4,184,000           |
| <b>Retail goods</b>                         | \$692,000           | \$5,936,000         | \$6,628,000           |
| <b>Services (fees, admissions, etc.)</b>    | \$164,000           | \$2,418,000         | \$2,582,000           |
| <b>TOTAL</b>                                | <b>\$12,294,000</b> | <b>\$30,996,000</b> | <b>\$43,290,000</b>   |

Finally, when looking at regional numbers, keep in mind that regional analysis of resident travel of 50 miles or more away from home means that residents can and do travel within their own travel region. Therefore, the spread of dollars from one region to another is far less than the spread of dollars from one county to another.

## County Results

Overnight trips and spending by county show that Yellowstone County receives both the largest number (526,400 overnights) and the highest dollars spent in that county (\$158,947,000) compared with all other counties. Missoula County with 503,900 overnight trips and \$153,976,000 in spending is the next highest followed by Gallatin and Lewis and Clark Counties (Tables 18 and 19).

As shown in Table 18, residents took 13.5 million day trips in 2017, and spent a total of \$1.66 billion for those trips. Trips include business, vacation/recreation/VFR, and other type of trips.

**Table 18: Resident day trip travel numbers and spending in destination county\***

| County   | Total Day Trips to County | Total Spent at Destination | County      | Total Day Trips to County | Total Spent at Destination |
|--|---------------------------|----------------------------|-------------|---------------------------|----------------------------|
| Beaverhead                                       | 205,000                   | \$23,417,000               | Madison     | 219,000                   | \$32,784,000               |
| Big Horn   | 94,000                    | \$14,050,000               | Meagher     | 289,000                   | \$32,784,000               |
| Broadwater                                       | 62,000                    | \$9,367,000                | Mineral     | 133,000                   | \$9,367,000                |
| Carbon   | 578,000                   | \$65,568,000               | Missoula    | 1,352,000                 | \$224,804,000              |
| Carter   | 9,000                     | \$4,683,000                | Park        | 156,000                   | \$23,417,000               |
| Cascade  | 859,000                   | \$98,352,000               | Phillips    | 203,000                   | \$9,367,000                |
| Choteau  | 62,000                    | \$9,367,000                | Pondera     | 164,000                   | \$14,050,000               |
| Custer   | 183,000                   | \$23,417,000               | Powell      | 41,000                    | \$9,367,000                |
| Dawson   | 112,000                   | \$23,417,000               | Prairie     | 31,000                    | \$4,683,000                |
| Deer Lodge                                       | 94,000                    | \$14,050,000               | Ravalli     | 234,000                   | \$14,050,000               |
| Fergus   | 226,000                   | \$23,417,000               | Roosevelt   | 102,000                   | \$4,683,000                |
| Flathead   | 470,000                   | \$112,402,000              | Sanders     | 297,000                   | \$23,417,000               |
| Gallatin   | 1,477,000                 | \$173,287,000              | Sheridan    | 102,000                   | \$4,683,000                |
| Glacier  | 244,000                   | \$18,734,000               | Silver Bow  | 561,000                   | \$65,568,000               |
| Granite  | 94,000                    | \$14,050,000               | Stillwater  | 469,000                   | \$28,101,000               |
| Hill   | 240,000                   | \$28,101,000               | Sweet Grass | 31,000                    | \$4,683,000                |
| Jefferson  | 94,000                    | \$14,050,000               | Teton       | 297,000                   | \$23,417,000               |
| Lake   | 386,000                   | \$32,784,000               | Toole       | 133,000                   | \$9,367,000                |
| Lewis & Clark                                    | 1,207,000                 | \$149,870,000              | Valley      | 62,000                    | \$9,367,000                |
| Lincoln  | 306,000                   | \$28,101,000               | Wheatland   | 31,000                    | \$4,683,000                |
| McCone   | 102,000                   | \$4,683,000                | Yellowstone | 1,541,000                 | \$224,804,000              |
| <b>TOTAL DAY TRIP NUMBERS = 13,552,000</b>       |                           |                            |             |                           |                            |
| <b>TOTAL DAY TRIP SPENDING = \$1,662,613,000</b> |                           |                            |             |                           |                            |

\*The following counties had insufficient sample size and are not included in this table: Blaine, Daniels, Fallon, Garfield, Golden Valley, Judith Basin, Liberty, Musselshell, Petroleum, Powder River, Richland, Rosebud, Treasure.

# Resident Travel in Montana | 2018

Table 19: Resident overnight numbers and spending in destination county

| County   | Total Overnight Trips to Destinations in County | Total Spent by Travelers with Destination in County | County       | Total Overnight Trips to Destinations in County | Total Spent by Travelers with Destination in County |
|--|---|---|--------------|---|---|
| Beaverhead   | 76,100  | \$23,912,000  | Madison      | 40,700  | \$12,868,000  |
| Big Horn   | 20,300  | \$5,984,000   | Meagher      | 38,800  | \$12,150,000  |
| Blaine   | 12,400  | \$3,707,000   | Mineral      | 15,600  | \$4,932,000   |
| Broadwater   | 15,800  | \$5,057,000   | Missoula     | 503,900   | \$153,976,000                                       |
| Carbon   | 41,900  | \$13,374,000  | Musselshell  | 9,000   | \$2,486,000   |
| Carter   | 3,900   | \$1,038,000   | Park         | 88,000  | \$27,277,000  |
| Cascade  | 310,500   | \$91,864,000  | Petroleum    | 2,500   | \$725,000   |
| Choteau  | 15,400  | \$4,775,000   | Phillips     | 23,000  | \$6,774,000   |
| Custer   | 47,300  | \$13,111,000  | Pondera      | 17,000  | \$4,840,000   |
| Daniels  | 2,000   | \$669,000   | Powder River | 7,800   | \$2,146,000   |
| Dawson   | 32,300  | \$8,759,000   | Powell       | 16,800  | \$5,331,000   |
| Deer Lodge   | 40,000  | \$12,321,000  | Prairie      | 2,600   | \$786,000   |
| Fallon   | 8,000   | \$2,094,000   | Ravalli      | 55,100  | \$16,954,000  |
| Fergus   | 70,900  | \$20,588,000  | Richland     | 38,800  | \$10,361,000  |
| Flathead   | 322,400   | \$98,393,000  | Roosevelt    | 21,900  | \$5,839,000   |
| Gallatin   | 490,100   | \$146,713,000                                       | Rosebud      | 15,900  | \$4,786,000   |
| Garfield   | 3,800   | \$1,266,000   | Sanders      | 41,800  | \$12,746,000  |
| Glacier  | 69,200  | \$21,095,000  | Sheridan     | 7,700   | \$2,139,000   |
| Golden Valley  | 3,300   | \$1,098,000   | Silver Bow   | 151,800   | \$44,847,000  |
| Granite  | 27,800  | \$8,904,000   | Stillwater   | 28,400  | \$8,563,000   |
| Hill   | 65,600  | \$18,264,000  | Sweet Grass  | 20,400  | \$5,646,000   |
| Jefferson  | 18,100  | \$5,650,000   | Teton        | 16,600  | \$5,199,000   |
| Judith Basin   | 7,600   | \$2,476,000   | Toole        | 36,300  | \$10,587,000  |
| Lake   | 80,300  | \$25,767,000  | Treasure     | 2,000   | \$626,000   |
| Lewis & Clark  | 382,100   | \$112,821,000                                       | Valley       | 50,500  | \$15,322,000  |
| Liberty  | 7,500   | \$2,243,000   | Wheatland    | 6,600   | \$2,082,000   |
| Lincoln  | 47,600  | \$14,802,000  | Wibaux       | 600   | \$179,000   |
| McCone   | 3,800   | \$1,110,000   | Yellowstone  | 526,400   | \$158,947,000                                       |
| <b>TOTAL OVERNIGHTS = 4,012,500</b>                    |   |   |              |   |   |
| <b>TOTAL OVERNIGHT TRIP SPENDING = \$1,206,969,000</b> |   |   |              |   |   |

Sample size for the mail back surveys prohibited individual breakdown for most counties. Appendix D provides detailed trip characteristics of residents who spent at least one night in Yellowstone, Gallatin, Missoula, Flathead, Lewis & Clark, and Cascade Counties, as well as each of the six travel regions. Short summaries are described here.

## Yellowstone County

Yellowstone County receives the highest number of resident visitors in the state (12%) and captures 13.2 percent of all spending (Table 20). Billings represents 97 percent of all overnights in Yellowstone County. The number of resident day and overnight trips to the County include:

- **Business:** Overnight = 248,300; Day = 914,000
- **Vacation/rec./VFR:** overnight=234,100; Day=375,000
- **Other type:** overnight = 44,000; Day = 252,000

Table 20: Overnight spending by visitors to Yellowstone County

| Spending en route/in Yellowstone County  | En route            | Destination          | Total Travel Spending |
|--|---------------------|----------------------|-----------------------|
| <b>Fuel</b>                              | \$23,062,000        | \$12,995,000         | \$36,057,000          |
| <b>Lodging, camping</b>                  | \$2,744,000         | \$22,046,000         | \$24,790,000          |
| <b>Restaurants, bars</b>                 | \$10,500,000        | \$38,422,000         | \$48,922,000          |
| <b>Groceries</b>                         | \$5,692,000         | \$9,670,000          | \$15,362,000          |
| <b>Retail goods</b>                      | \$2,542,000         | \$21,794,000         | \$24,336,000          |
| <b>Services (fees, admissions, etc.)</b> | \$602,000           | \$8,878,000          | \$9,480,000           |
| <b>TOTAL</b>                             | <b>\$45,142,000</b> | <b>\$113,805,000</b> | <b>\$158,947,000</b>  |

## Gallatin County

Gallatin County receives 12.2 percent of resident spending in Montana and represents 11 percent of state overnights (Table 21). Bozeman has 74 percent of all county overnights; Big Sky has 12 percent of county overnights and West Yellowstone has 8 percent of county overnights. The number of resident day and overnight trips to the County include:

- **Business:** Overnight = 213,500; Day = 812,00
- **Vacation/rec./VFR:** Overnight=263,000; Day=562,000
- **Other type:** Overnight = 13,600; Day = 103,000

Table 21: Overnight spending by visitors to Gallatin County

| Spending en route/ in Gallatin County    | En route            | Destination          | Total Travel Spending |
|--|---------------------|----------------------|-----------------------|
| <b>Fuel</b>                              | \$21,287,000        | \$11,994,000         | \$33,281,000          |
| <b>Lodging, camping</b>                  | \$2,533,000         | \$20,349,000         | \$22,882,000          |
| <b>Restaurants, bars</b>                 | \$9,692,000         | \$35,464,000         | \$45,156,000          |
| <b>Groceries</b>                         | \$5,254,000         | \$8,925,000          | \$14,179,000          |
| <b>Retail goods</b>                      | \$2,346,000         | \$20,116,000         | \$22,462,000          |
| <b>Services (fees, admissions, etc.)</b> | \$556,000           | \$8,195,000          | \$8,751,000           |
| <b>TOTAL</b>                             | <b>\$41,668,000</b> | <b>\$105,043,000</b> | <b>\$146,711,000</b>  |

## Missoula County

Missoula County receives 12.8 percent of resident spending in Montana and represents 11 percent of state overnights (Table 22). Missoula has 82 percent of all overnights of the county and Seeley Lake has 11 percent of Missoula County overnights. The number of resident day and overnight trips to Missoula County are as follows:

- **Business:** Overnight = 188,800; Day = 609,000
- **Vacation/rec./VFR:** Overnight=296,000; Day=500,000
- **Other type:** Overnight = 19,100; Day = 243,000

Table 22: Overnight spending by visitors to Missoula County

| Spending en route/ in Missoula County | En route            | Destination          | Total Travel Spending |
|---------------------------------------|---------------------|----------------------|-----------------------|
| Fuel                                  | \$22,341,000        | \$12,588,000         | \$34,929,000          |
| Lodging, camping                      | \$2,658,000         | \$21,357,000         | \$24,015,000          |
| Restaurants, bars                     | \$10,172,000        | \$37,220,000         | \$47,392,000          |
| Groceries                             | \$5,514,000         | \$9,367,000          | \$14,881,000          |
| Retail goods                          | \$2,462,000         | \$21,112,000         | \$23,574,000          |
| Services (fees, admissions, etc.)     | \$583,000           | \$8,601,000          | \$9,184,000           |
| <b>TOTAL</b>                          | <b>\$43,730,000</b> | <b>\$110,245,000</b> | <b>\$153,975,000</b>  |

## Lewis & Clark County

Lewis & Clark County receives 9.3 percent of resident spending in Montana and has 9 percent of state overnights (Table 23). Helena receives 76 percent of all Lewis & Clark County overnights while Lincoln has 9 percent and Augusta has 8 percent of Lewis & Clark County overnights. The number of resident day and overnight trips to Lewis & Clark County are as follows:

- **Business:** Overnight = 187,700; Day = 711,000
- **Vacation/rec./VFR:** Overnight=181,500; Day=375,000
- **Other type:** Overnight = 12,900; Day = 121,000

Table 23: Overnight spending by visitors to Lewis & Clark County

| Spending en route/in Lewis & Clark County | En route            | Destination         | Total Travel Spending |
|---|---------------------|---------------------|-----------------------|
| Fuel                                      | \$16,369,000        | \$9,224,000         | \$25,593,000          |
| Lodging, camping                          | \$1,948,000         | \$15,648,000        | \$17,596,000          |
| Restaurants, bars                         | \$7,453,000         | \$27,272,000        | \$34,725,000          |
| Groceries                                 | \$4,041,000         | \$6,863,000         | \$10,904,000          |
| Retail goods                              | \$1,804,000         | \$15,469,000        | \$17,273,000          |
| Services (fees, admissions, etc.)         | \$427,000           | \$6,302,000         | \$6,729,000           |
| <b>TOTAL</b>                              | <b>\$32,042,000</b> | <b>\$80,778,000</b> | <b>\$112,820,000</b>  |

## Flathead County

Flathead County receives 8.2 percent of resident spending in Montana and has 9 percent of state overnights (Table 24). Kalispell has 55 percent of all county overnights; Whitefish has 19 percent; Bigfork 8 percent; Columbia Falls 5 percent; Hungry Horse 4 percent; and Polebridge 3 percent of Flathead County overnights. The number of resident day and overnight trips to Flathead County include:

- **Business:** Overnight = 119,800; Day = 102,000
- **Vacation/rec./VFR:** Overnight=192,400; Day=219,000
- **Other type:** Overnight = 10,200; Day = 149,000

Table 24: Overnight spending by visitors to Flathead County

| Spending en route/in Flathead County | En route            | Destination         | Total Travel Spending |
|--------------------------------------|---------------------|---------------------|-----------------------|
| Fuel                                 | \$14,276,000        | \$8,044,000         | \$22,320,000          |
| Lodging, camping                     | \$1,699,000         | \$13,647,000        | \$15,346,000          |
| Restaurants, bars                    | \$6,500,000         | \$23,784,000        | \$30,284,000          |
| Groceries                            | \$3,524,000         | \$5,986,000         | \$9,510,000           |
| Retail goods                         | \$1,573,000         | \$13,491,000        | \$15,064,000          |
| Services (fees, admissions, etc.)    | \$373,000           | \$5,496,000         | \$5,869,000           |
| <b>TOTAL</b>                         | <b>\$27,945,000</b> | <b>\$70,448,000</b> | <b>\$98,393,000</b>   |

## Cascade County

Cascade County receives 7.6 percent of resident spending in Montana and has 7 percent of Montana overnights (Table 25). Great Falls represents 88 percent of all overnights in Cascade County, Cascade 4 percent, and Neihart represents 3 percent of overnights in Cascade County. The number of resident day and overnight trips to Cascade County include:

- **Business:** Overnight = 147,500; Day = 609,000
- **Vacation/rec./VFR:** Overnight=154,900; Day=156,000
- **Other type:** Overnight = 8,100; Day = 93,000

Table 25: Overnight spending by visitors to Cascade County

| Spending en route/in Cascade County | En route            | Destination         | Total Travel Spending |
|-------------------------------------|---------------------|---------------------|-----------------------|
| Fuel                                | \$13,329,000        | \$7,510,000         | \$20,839,000          |
| Lodging, camping                    | \$1,586,000         | \$12,742,000        | \$14,328,000          |
| Restaurants, bars                   | \$6,069,000         | \$22,206,000        | \$28,275,000          |
| Groceries                           | \$3,290,000         | \$5,588,000         | \$8,878,000           |
| Retail goods                        | \$1,469,000         | \$12,596,000        | \$14,065,000          |
| Services (fees, admissions, etc.)   | \$348,000           | \$5,131,000         | \$5,479,000           |
| <b>TOTAL</b>                        | <b>\$26,091,000</b> | <b>\$65,773,000</b> | <b>\$91,864,000</b>   |



## Conclusions & Recommendations

This year-long study was conducted to provide an estimate of resident trip numbers and spending throughout the state of Montana. These data, along with nonresident visitor numbers and spending, provide a full picture of the travel industry in Montana.

In 2017, residents spent nearly \$2.87 billion on trips 50 miles or more away from home but still in Montana. In comparison, nonresidents spent nearly \$3.36 billion in Montana on their trips<sup>7</sup>. Total travel industry spending in Montana is \$6.23 billion dollars; 54 percent contributed by nonresidents and 46 percent by resident travel within the state.

Resident travel contributes to local economies throughout the state. However, the highest recipient counties of travel spending are the most populated counties, or those with the larger communities. This is partly explained by the fact that larger communities have more special events, dining opportunities, shopping, art and culture, medical, and a place where relatives and friends live.

The assessment of resident travel is a difficult undertaking. Unlike nonresidents who come, spend their time, then leave, residents come and go multiple times each month for a variety of purposes. Eliciting accurate responses from residents each month about the previous month's travels in detail is not easy for both the respondent and the researcher. To enhance this report, we also conducted a companion study to this one. That study was a year-long diary-type panel survey which asked the same 347 people each month to record their travels. That report (forthcoming), along with this one provides a unique look at the big numbers of travel and spending, along with a more detailed case study approach of household travel followed throughout a full year.

This report was limited in its detail for most counties due to a 16 percent response rate of the mail back surveys. We recommend for any future resident travel studies to forego the mail back survey method and simply assess the number of trips when intercepting residents. Resident travel is not expected to significantly change year to year in the short term. As such, average trip spending from this report can be used for future years by simply inflating the dollars to the current year of assessment.

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<sup>7</sup> [https://scholarworks.umt.edu/itrr\\_pubs/367/](https://scholarworks.umt.edu/itrr_pubs/367/)

## Appendix A: Front end interview survey instrument

Hello! My name is \_\_\_\_\_, and I am with the University of Montana doing a quick survey on resident travel. Do you have time so I can ask you a few questions? My hope is that it won't take longer than it takes you to fill up... (You only need to enter "ref" here if they refuse to participate... and then scroll down and enter site code and date.)

1. Did you take any day or overnight trips 50 miles or more one way from home in the past year for any reason (including business, shopping, etc.)?
2. Last month, how many DAY TRIPS for BUSINESS as your primary purpose did you take that were 50 miles or more one-way from home?
  - a. Of those (business day trips), how many were to destinations within Montana?
3. Last month, how many OVERNIGHT trips for BUSINESS as the primary purpose did you take that were 50 miles or more one-way from home?
  - a. Of those (business overnight trips), how many were to destinations within Montana?
  - b. What towns in Montana did you spend overnights and how many nights? (Name and # of nights per town up to 8 towns asked)
4. Last month, how many DAY TRIPS for RECREATION/PLEASURE/VISITING FRIENDS OR RELATIVES as your primary purpose did you take that were 50 miles or more one-way from home?
  - a. Of those (pleasure day trips), how many were to destinations within Montana?
5. Last month, how many OVERNIGHT trips for RECREATION/PLEASURE/VISITING FRIENDS OR RELATIVES as the primary purpose did you take that were 50 miles or more one-way from home?
  - a. Of those (pleasure overnight trips), how many were to destinations within Montana?
  - b. What towns in Montana did you spend overnights and how many nights? (Name and # of nights per town up to 8 towns asked)
6. Last month, how many DAY trips with some OTHER reason as your primary purpose did you take that were 50 miles or more one-way from home? For example, this could be trips for medical, funeral, or any other trips that did not fit in one of the two categories above...
  - a. Of those ('other' trips), how many were to destinations within Montana?
7. Last month, how many OVERNIGHT trips with some OTHER reason as your primary purpose did you take that were 50 miles or more one-way from home?
  - a. Of those ('other' overnight trips), how many were to destinations within Montana?

- b. What towns in Montana did you spend overnights and how many nights? (Name and # of nights per town up to 8 towns asked)
8. What county do you currently reside in?
9. May I please have your zip code?
10. May I please ask your age?

Thank you for your time! We are interested in knowing more about your travel in the state and instead of taking up your time right now, please take the rest of this survey and mail it back in this postage-paid envelope at your convenience! If you mail it back in the next 3 weeks, you will be entered into a drawing for \$100 gift card at the end of the month and into the drawing of a \$1,000 grand prize at year's end.

(Please enter survey ID unless they refuse, then enter "ref.")

Gender (please observe)

Site Code

Date

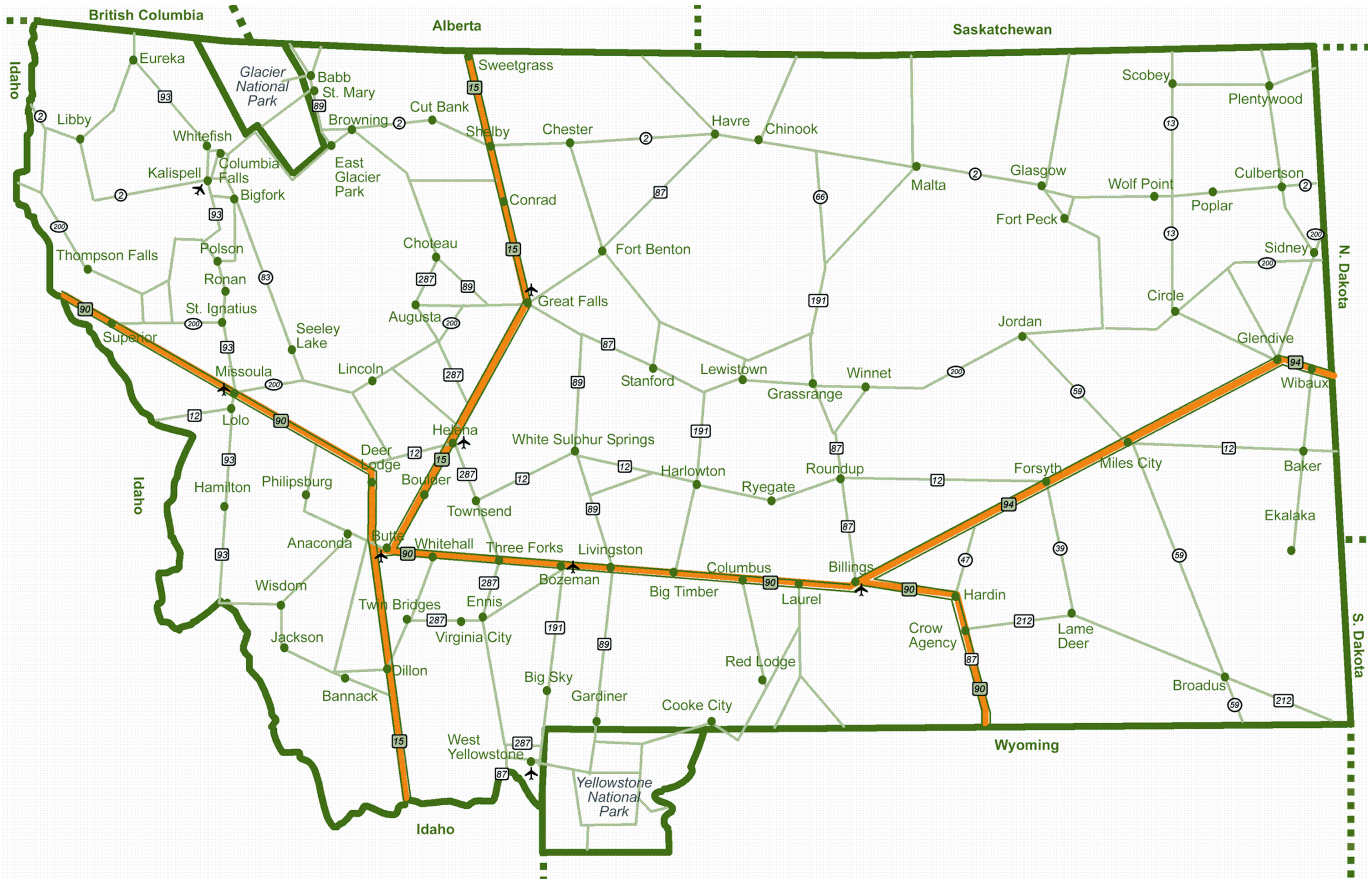
Surveyor Comments

**Appendix B: Mail back survey instrument**

2017 Resident Travel Survey

Please recall the most recent trip (day or overnight) within the past month that you took at least 50 miles away from home.

1) Using the map below, start from home and trace your route on THAT trip. We apologize if your community is not on the map; space precludes listing every town. If you went out of state, point an arrow where you exited and where you re-entered Montana.



2) With the map as a reminder of your trip, please tell us how much you spent in each category for the trip at home, enroute, and at the Montana destination. **WE ARE ONLY INTERESTED IN MONEY SPENT IN MONTANA.** Your estimates should include everything that was spent by *you and your travel group for that trip*.

|   | Amount spent <u>at home</u><br>for trip | Amount spent enroute<br>in Montana (to & from) | Amount spent <u>at</u><br><u>Montana destination</u> |
|---|---|--|--|
| Gasoline                                      | \$ _____                                | \$ _____                                       | \$ _____   |
| Lodging/camping                               | \$ _____                                | \$ _____                                       | \$ _____   |
| Restaurants and bars                          | \$ _____                                | \$ _____                                       | \$ _____   |
| Groceries/snacks                              | \$ _____                                | \$ _____                                       | \$ _____   |
| Retail goods                                  | \$ _____                                | \$ _____                                       | \$ _____   |
| Services (fees, admissions,<br>rentals, etc.) | \$ _____                                | \$ _____                                       | \$ _____   |
| Describe the service(s):                      | <div></div>                             | <div></div>                                    | <div></div>  |

3) How many nights did you spend away from home, but in Montana, while on that trip?

4) If nights were spent away from home but in Montana on that trip, list the town (or nearest town) and write the # of the lodging type (from list on right) for each of your first 8 nights.

| <u>Montana Town</u> | <u>Lodging Type #</u> | <u>Lodging Types</u>           |
|---------------------|-----------------------|--------------------------------|
| Night 1             | <div></div>           | Type # for night 1 <div></div> |
| Night 2             | <div></div>           | Type # for night 2 <div></div> |
| Night 3             | <div></div>           | Type # for night 3 <div></div> |
| Night 4             | <div></div>           | Type # for night 4 <div></div> |
| Night 5             | <div></div>           | Type # for night 5 <div></div> |
| Night 6             | <div></div>           | Type # for night 6 <div></div> |
| Night 7             | <div></div>           | Type # for night 7 <div></div> |
| Night 8             | <div></div>           | Type # for night 8 <div></div> |

1) Hotel/motel  
2) Bed & breakfast  
3) Public land camping (e.g. State/National Park, Forest Service, BLM)  
4) Private campground (KOA, etc.)  
5) Home/condo/cabin of friend/relative  
6) My second home/condo/cabin  
7) Rented entire cabin/home  
8) Rented room in home  
9) Resort/condominium  
10) Guest ranch  
11) Vehicle in parking area  
12) Other (please describe)

5) What month did you take that trip? (Please select the month in which the trip began.)

|                                   |                                |                                    |                                   |
|-----------------------------------|--------------------------------|------------------------------------|-----------------------------------|
| <input type="checkbox"/> January  | <input type="checkbox"/> April | <input type="checkbox"/> July      | <input type="checkbox"/> October  |
| <input type="checkbox"/> February | <input type="checkbox"/> May   | <input type="checkbox"/> August    | <input type="checkbox"/> November |
| <input type="checkbox"/> March    | <input type="checkbox"/> June  | <input type="checkbox"/> September | <input type="checkbox"/> December |

6) What was the main reason you took that trip? (Please select only one.)

|                                   |  |  |
|-----------------------------------|--|--|
| <input type="checkbox"/> Business | <input type="checkbox"/> Recreation/pleasure/visiting friends or relatives | <input type="checkbox"/> Other (shopping, medical, etc.) |
|-----------------------------------|--|--|

7) What mode(s) of travel did you use in Montana on that trip? (Please select all that apply.)

|  |                                     |                                   |
|--|-------------------------------------|-----------------------------------|
| <input type="checkbox"/> Car/Truck         | <input type="checkbox"/> Motorcycle | <input type="checkbox"/> Airplane |
| <input type="checkbox"/> RV/Trailer/Camper | <input type="checkbox"/> Bus        | <input type="checkbox"/> Bicycle  |

8) How many adults 18 and older were in your travel group on that trip including yourself?

9) How many children under 18 were in your travel group on that trip?

10) Please check all the activities you or others from your travel group participated in while IN Montana on that trip:

**Outdoor Land-based Recreation Activities:**

|   |  |  |   |
|---|--|--|---|
| <input type="checkbox"/> Car/RV camping     | <input type="checkbox"/> Hunting           | <input type="checkbox"/> Bicycling           | <input type="checkbox"/> Motorcycle touring |
| <input type="checkbox"/> Day hiking         | <input type="checkbox"/> Birding           | <input type="checkbox"/> Mountain biking     | <input type="checkbox"/> OHV/ATV            |
| <input type="checkbox"/> Backpacking        | <input type="checkbox"/> Watching wildlife | <input type="checkbox"/> Road/tour bicycling | <input type="checkbox"/> Scenic driving     |
| <input type="checkbox"/> Horseback riding   | <input type="checkbox"/> Geocaching        | <input type="checkbox"/> Rock hounding       |   |
| <input type="checkbox"/> Nature photography | <input type="checkbox"/> Rock climbing     | <input type="checkbox"/> Golfing             |   |

**Water-based Activities:**

|  |  |   |
|--|--|---|
| <input type="checkbox"/> Motor boating     | <input type="checkbox"/> Fly fishing   | <input type="checkbox"/> River rafting/floating |
| <input type="checkbox"/> Canoeing/kayaking | <input type="checkbox"/> Other fishing | <input type="checkbox"/> Visit hot springs      |

**Winter Activities:**

|  |   |                                      |
|--|---|--------------------------------------|
| <input type="checkbox"/> Snowmobiling        | <input type="checkbox"/> Cross country skiing | <input type="checkbox"/> Ice fishing |
| <input type="checkbox"/> Skiing/snowboarding | <input type="checkbox"/> Snowshoeing          |                                      |

**Cultural or Art Activities:**

|  |   |   |
|--|---|---|
| <input type="checkbox"/> View art exhibits               | <input type="checkbox"/> Visit Indian reservations    | <input type="checkbox"/> Visit museums                |
| <input type="checkbox"/> Attend festivals/special events | <input type="checkbox"/> Visit Lewis & Clark sites    | <input type="checkbox"/> Visit local brewery          |
| <input type="checkbox"/> Attend performing arts          | <input type="checkbox"/> Visit other historical sites | <input type="checkbox"/> Visit local distillery       |
| <input type="checkbox"/> Visit farmers markets           | <input type="checkbox"/> Visit ghost towns            | <input type="checkbox"/> Dining as a special activity |

**Other Activities:**

|   |   |  |
|---|---|--|
| <input type="checkbox"/> Attend/participate in sporting event | <input type="checkbox"/> Visit dinosaur attractions | <input type="checkbox"/> Attend a family event (e.g., reunion) |
| <input type="checkbox"/> Recreational shopping                | <input type="checkbox"/> Attend a wedding           |  |

11) In which Montana county do you currently reside?

12) What is your zip code?

13) What is your highest completed level of education? (Please select only one.)

|  |   |
|--|---|
| <input type="checkbox"/> Less than high school             | <input type="checkbox"/> Undergraduate Degree                         |
| <input type="checkbox"/> High school diploma or GED        | <input type="checkbox"/> Advanced Degree (Masters, Ph.D., J.D., M.D.) |
| <input type="checkbox"/> Associates, Trade, or Certificate |   |

14) What best describes your annual household income in US dollars? (Please select only one.)

|  |   |
|--|---|
| <input type="checkbox"/> Less than \$25,000              | <input type="checkbox"/> \$100,000 to less than \$150,000 |
| <input type="checkbox"/> \$25,000 to less than \$50,000  | <input type="checkbox"/> \$150,000 to less than \$200,000 |
| <input type="checkbox"/> \$50,000 to less than \$75,000  | <input type="checkbox"/> \$200,000 or greater             |
| <input type="checkbox"/> \$75,000 to less than \$100,000 |   |

15) What is your gender? ☐ Male ☐ Female

16) What is your age?

**Thank you for your participation! Please fill out the additional form to be entered in the drawing!**

### Appendix C: Respondent's county of residence

| County          | N    | %    |  | County       | N    | %    |
|-----------------|------|------|--|--------------|------|------|
| Beaverhead      | 98   | 0.9  |  | McCone       | 19   | 0.2  |
| Big Horn        | 134  | 1.2  |  | Meagher      | 20   | 0.2  |
| Blaine          | 66   | 0.6  |  | Mineral      | 45   | 0.4  |
| Broadwater      | 63   | 0.6  |  | Missoula     | 1197 | 11.1 |
| Carbon          | 104  | 1.0  |  | Musselshell  | 43   | 0.4  |
| Carter          | 9    | 0.1  |  | Park         | 171  | 1.6  |
| Cascade         | 852  | 7.9  |  | Petroleum    | 5    | 0.0  |
| Choteau         | 56   | 0.5  |  | Phillips     | 47   | 0.4  |
| Custer          | 129  | 1.2  |  | Pondera      | 64   | 0.6  |
| Daniels         | 19   | 0.2  |  | Powder River | 21   | 0.2  |
| Dawson          | 99   | 0.9  |  | Powell       | 71   | 0.7  |
| Deer Lodge      | 94   | 0.9  |  | Prairie      | 15   | 0.1  |
| Fallon          | 36   | 0.3  |  | Ravalli      | 447  | 4.1  |
| Fergus          | 123  | 1.1  |  | Richland     | 119  | 1.1  |
| Flathead        | 1037 | 9.6  |  | Roosevelt    | 122  | 1.1  |
| Gallatin        | 1077 | 10.0 |  | Rosebud      | 87   | 0.8  |
| Garfield        | 12   | 0.1  |  | Sanders      | 119  | 1.1  |
| Glacier         | 144  | 1.3  |  | Sheridan     | 37   | 0.3  |
| Golden Valley   | 8    | 0.1  |  | Silver Bow   | 354  | 3.3  |
| Granite         | 35   | 0.3  |  | Stillwater   | 89   | 0.8  |
| Hill            | 176  | 1.6  |  | Sweet Grass  | 39   | 0.4  |
| Jefferson       | 123  | 1.1  |  | Teton        | 64   | 0.6  |
| Judith Basin    | 21   | 0.2  |  | Toole        | 53   | 0.5  |
| Lake            | 329  | 3.1  |  | Treasure     | 7    | 0.1  |
| Lewis and Clark | 703  | 6.5  |  | Valley       | 81   | 0.7  |
| Liberty         | 22   | 0.2  |  | Wheatland    | 21   | 0.2  |
| Lincoln         | 198  | 1.8  |  | Wibaux       | 8    | 0.1  |
| Madison         | 80   | 0.7  |  | Yellowstone  | 1571 | 14.6 |

**Appendix D: Overnight visitor characteristics for select counties and the six travel regions**

**COUNTIES**

Yellowstone County  
Gallatin County  
Missoula County  
Flathead County  
Lewis & Clark County  
Cascade Counties County

**REGIONS**

Glacier  
Southwest  
Yellowstone  
Central  
Southeast  
Missouri River



## Overnight Resident Travel to Yellowstone County, Montana

The purpose of this short summary is to further the understanding of Montana residents who spent time and money in Yellowstone County. *Yellowstone County represents 12% of all resident overnights in MT, the highest of all counties and 13.2% of all spending.*

**Billings represents 97% of all overnights in Yellowstone County.**

### Number of Resident trips to Yellowstone County

**Business:** Overnight = 248,300; Day = 914,000

**Vacation/rec./VFR:** Overnight=234,100; Day=375,000

**Other type:** Overnight = 44,000; Day = 252,000

### Overnight visitor dollars spent in Yellowstone County

|                                   | Destination \$       |
|-----------------------------------|----------------------|
| Fuel                              | \$12,995,000         |
| Lodging, camping                  | \$22,046,000         |
| Restaurants, bars                 | \$38,422,000         |
| Groceries                         | \$9,670,000          |
| Retail goods                      | \$21,794,000         |
| Services (fees, admissions, etc.) | \$8,878,000          |
| <b>TOTAL</b>                      | <b>\$113,805,000</b> |

### Type of lodging used on trip (percent of visitors)

|                      |     |              |    |
|----------------------|-----|--------------|----|
| Hotel/motel          | 47% | Rented home  | -- |
| Bed & Breakfast      | 1%  | Rented room  | -- |
| Public land camping  | 1%  | Resort/condo | -- |
| Private campground   | 9%  | Guest ranch  | -- |
| Friend/relative home | 39% | Parking lot  | 2% |
| My second Home       | --  | Other        | -- |

### Percent of visitors per month

|          |     |           |     |
|----------|-----|-----------|-----|
| January  | 5%  | July      | 8%  |
| February | 10% | August    | 10% |
| March    | 18% | September | 7%  |
| April    | 8%  | October   | 7%  |
| May      | 6%  | November  | 11% |
| June     | 7%  | December  | 5%  |

### Main reason for trip to Yellowstone County

Business: 18%

Vacation/recreation/VFR: 57%

Other type (i.e. shopping, medical): 26%

Average number of adults on trip: 1.84

Average number of children <18 on trip: 0.58

Average group size: 2.34

### Activities participated in during their trip in MT

|                    |     |                     |     |
|--------------------|-----|---------------------|-----|
| Recreational shop  | 31% | Lewis & Clark sites | 4%  |
| Scenic driving     | 26% | Other fishing       | 4%  |
| Special dining out | 24% | Visit hot springs   | 3%  |
| Family event       | 15% | Golfing             | 2%  |
| Local brewery      | 11% | Bicycling           | 2%  |
| Festival/events    | 9%  | Local distillery    | 2%  |
| Watching wildlife  | 9%  | Horseback riding    | 2%  |
| Sporting event     | 9%  | Dino attractions    | 2%  |
| Nature photography | 8%  | Performing arts     | 2%  |
| Car/RV camping     | 8%  | Motorcycle tour     | 1%  |
| Museums            | 7%  | Backpacking         | 1%  |
| Farmers markets    | 6%  | Ghost towns         | 1%  |
| Hunting            | 6%  | Rock climbing       | 1%  |
| Historical sites   | 6%  | Geocaching          | 1%  |
| Wedding            | 5%  | Rock hounding       | <1% |
| View art exhibits  | 5%  | Motor boating       | <1% |
| Visit Indian Res.  | 4%  |                     |     |
| Day hiking         | 5%  |                     |     |

### Demographics

Gender: 47% male 53% female

Average respondent age: 55.9

### % within each age category

|       |     |       |     |       |     |
|-------|-----|-------|-----|-------|-----|
| 18-29 | 6%  | 40-49 | 12% | 60-69 | 31% |
| 30-39 | 13% | 50-59 | 21% | 70+   | 19% |

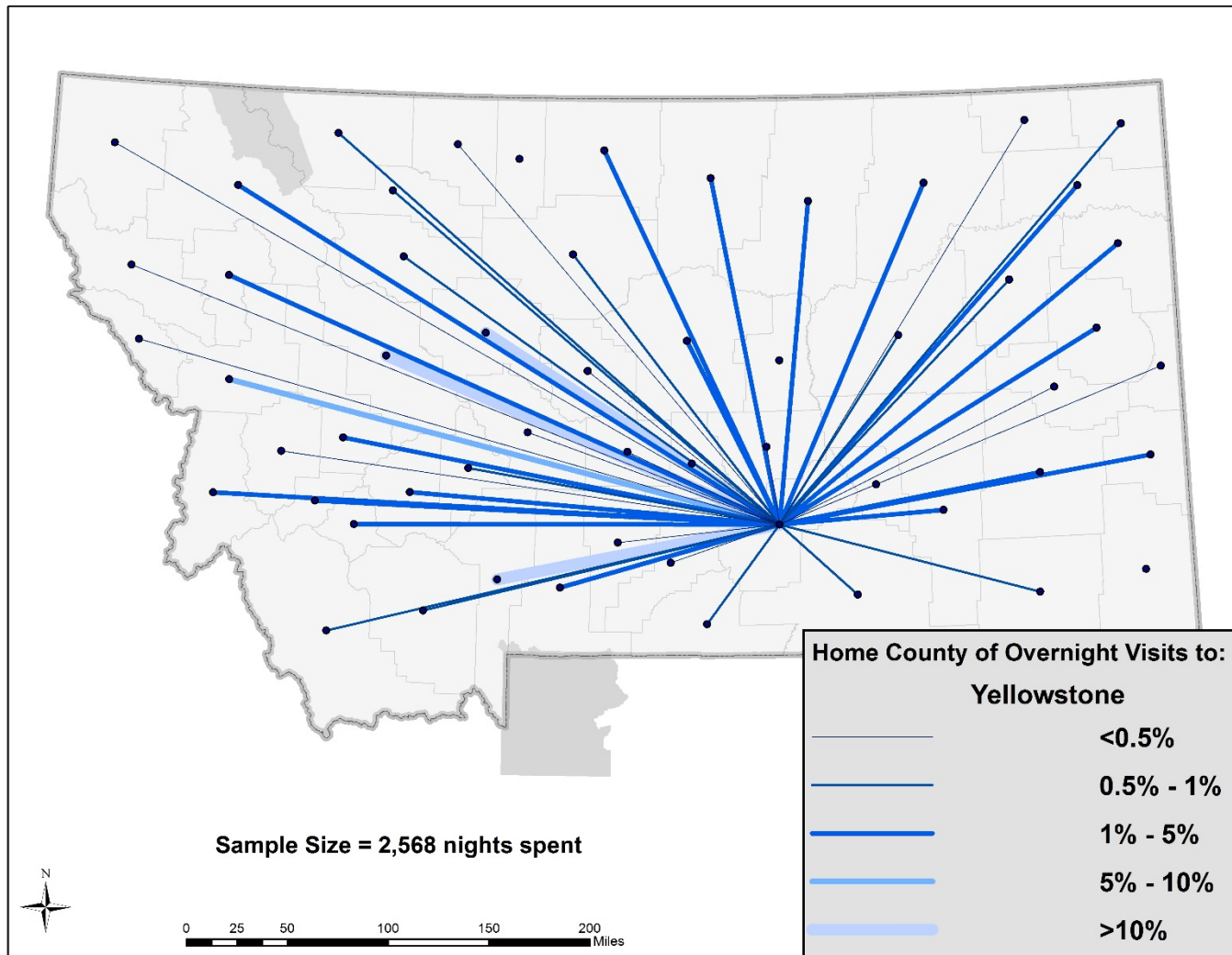
### Education level

|                       |     |                  |     |
|-----------------------|-----|------------------|-----|
| < high school         | --  | Undergrad degree | 29% |
| High school or GED    | 33% | Advanced degree  | 18% |
| Associate/trade/Cert. | 21% |                  |     |

### Household Income

|                      |     |                   |     |
|----------------------|-----|-------------------|-----|
| < \$25,000 HH income | 8%  | \$100K to <\$150K | 12% |
| \$25K to < \$50K     | 25% | \$150K to <\$200K | 4%  |
| \$50K to < \$75K     | 26% | \$200K +          | 3%  |
| \$75K to < \$100K    | 23% |                   |     |

## Origins of residents who visited Yellowstone County for OVERNIGHT TRIPS



## Percent of total overnight visitors from each county to Yellowstone County (top 5 highlighted)

|            |       |               |       |              |      |             |      |
|------------|-------|---------------|-------|--------------|------|-------------|------|
| Beaverhead | 0.6%  | Flathead      | 3.1%  | Madison      | 0.9% | Roosevelt   | 3.9% |
| Big Horn   | 1.0%  | Gallatin      | 11.7% | Meagher      | 0.2% | Rosebud     | 4.4% |
| Blaine     | 1.6%  | Garfield      | 0.6%  | Mineral      | 0.2% | Sanders     | 0.3% |
| Broadwater | 0.5%  | Glacier       | 0.6%  | Missoula     | 7.1% | Sheridan    | 0.5% |
| Carbon     | 0.8%  | Golden Valley | 0.0%  | Musselshell  | 0.2% | Silver Bow  | 4.0% |
| Carter     | 0.1%  | Granite       | 0.2%  | Park         | 1.1% | Stillwater  | 0.2% |
| Cascade    | 10.0% | Hill          | 2.0%  | Petroleum    | 0.0% | Sweet Grass | 0.2% |
| Choteau    | 0.6%  | Jefferson     | 1.2%  | Phillips     | 1.3% | Teton       | 0.5% |
| Custer     | 2.6%  | Judith Basin  | 0.1%  | Pondera      | 0.9% | Toole       | 0.3% |
| Daniels    | 0.4%  | Lake          | 3.5%  | Powder River | 0.6% | Treasure    | 0.0% |
| Dawson     | 3.3%  | Lewis & Clark | 10.3% | Powell       | 1.1% | Valley      | 1.9% |
| Deer Lodge | 1.4%  | Liberty       | 0.0%  | Prairie      | 0.5% | Wheatland   | 0.4% |
| Fallon     | 2.4%  | Lincoln       | 0.4%  | Ravalli      | 1.6% | Wibaux      | 0.2% |
| Fergus     | 2.8%  | McCone        | 0.5%  | Richland     | 2.6% | Yellowstone | 2.6% |

## Overnight Resident Travel to Gallatin County, Montana

The purpose of this short summary is to further the understanding of Montana residents who spent time and money in Gallatin County. *Gallatin County represents 11% of state overnights. Bozeman has 74% of all county overnights; Big Sky has 12% of county overnights and W. Yellowstone has 8% of county overnights.*

### Number of Resident trips to Gallatin County

**Business:** Overnight = 213,500; Day = 812,000

**Vacation/rec./VFR:** Overnight=263,000; Day=562,000

**Other type:** Overnight = 13,600; Day = 103,000

### Overnight visitor dollars spent in Gallatin County

|                                   | Destination \$       |
|-----------------------------------|----------------------|
| Fuel                              | \$11,994,000         |
| Lodging, camping                  | \$20,349,000         |
| Restaurants, bars                 | \$35,464,000         |
| Groceries                         | \$8,925,000          |
| Retail goods                      | \$20,116,000         |
| Services (fees, admissions, etc.) | \$8,195,000          |
| <b>TOTAL</b>                      | <b>\$105,043,000</b> |

### Type of lodging used on trip (percent of visitors)

|                      |     |              |    |
|----------------------|-----|--------------|----|
| Hotel/motel          | 44% | Rented home  | 4% |
| Bed & Breakfast      | <1% | Rented room  | 4% |
| Public land camping  | 3%  | Resort/condo | 1% |
| Private campground   | 7%  | Guest ranch  | -- |
| Friend/relative home | 32% | Parking lot  | 1% |
| My second Home       | 1%  | Other        | 3% |

### Percent of visitors per month

|          |     |           |     |
|----------|-----|-----------|-----|
| January  | 6%  | July      | 8%  |
| February | 6%  | August    | 8%  |
| March    | 18% | September | 12% |
| April    | 8%  | October   | 5%  |
| May      | 11% | November  | 6%  |
| June     | 8%  | December  | 5%  |

### Main reason for trip to Gallatin County

Business: 17%

Vacation/recreation/VFR: 78%

Other type (i.e. shopping, medical): 5%

Average number of adults on trip: 2.08

Average number of children <18 on trip: 0.46

Average group size: 2.41

### Activities participated in during their trip in MT

|                    |     |                     |    |
|--------------------|-----|---------------------|----|
| Scenic driving     | 41% | Bicycling           | 4% |
| Special dining out | 23% | Ghost towns         | 4% |
| Day hiking         | 21% | Other fishing       | 3% |
| Local brewery      | 19% | Dino attractions    | 3% |
| Watching wildlife  | 17% | Snowmobile          | 3% |
| Nature photography | 16% | Motor boating       | 2% |
| Sporting event     | 13% | Attend wedding      | 2% |
| Museums            | 13% | Backpacking         | 2% |
| Festival/events    | 12% | Rock hounding       | 2% |
| Recreational shop  | 11% | Rafting/floating    | 2% |
| Car/RV camping     | 10% | Hunting             | 1% |
| Ski/board          | 10% | Visit Indian Res.   | 1% |
| Historical sites   | 8%  | Lewis & Clark sites | 1% |
| Fly fishing        | 7%  | Golfing             | 1% |
| Visit hot springs  | 6%  | Horseback riding    | 1% |
| Local distillery   | 6%  | Rock climbing       | 1% |
| Performing arts    | 6%  | Geocaching          | 1% |
| Family event       | 5%  | Birding             | 1% |
| Farmers markets    | 5%  | Canoe/kayak         | 1% |
| View art exhibits  | 5%  |                     |    |

### Demographics

Gender: 62% male 38% female

Average respondent age: 51.7

### % within each age category

|       |     |       |     |       |     |
|-------|-----|-------|-----|-------|-----|
| 18-29 | 12% | 40-49 | 17% | 60-69 | 26% |
| 30-39 | 9%  | 50-59 | 28% | 70+   | 8%  |

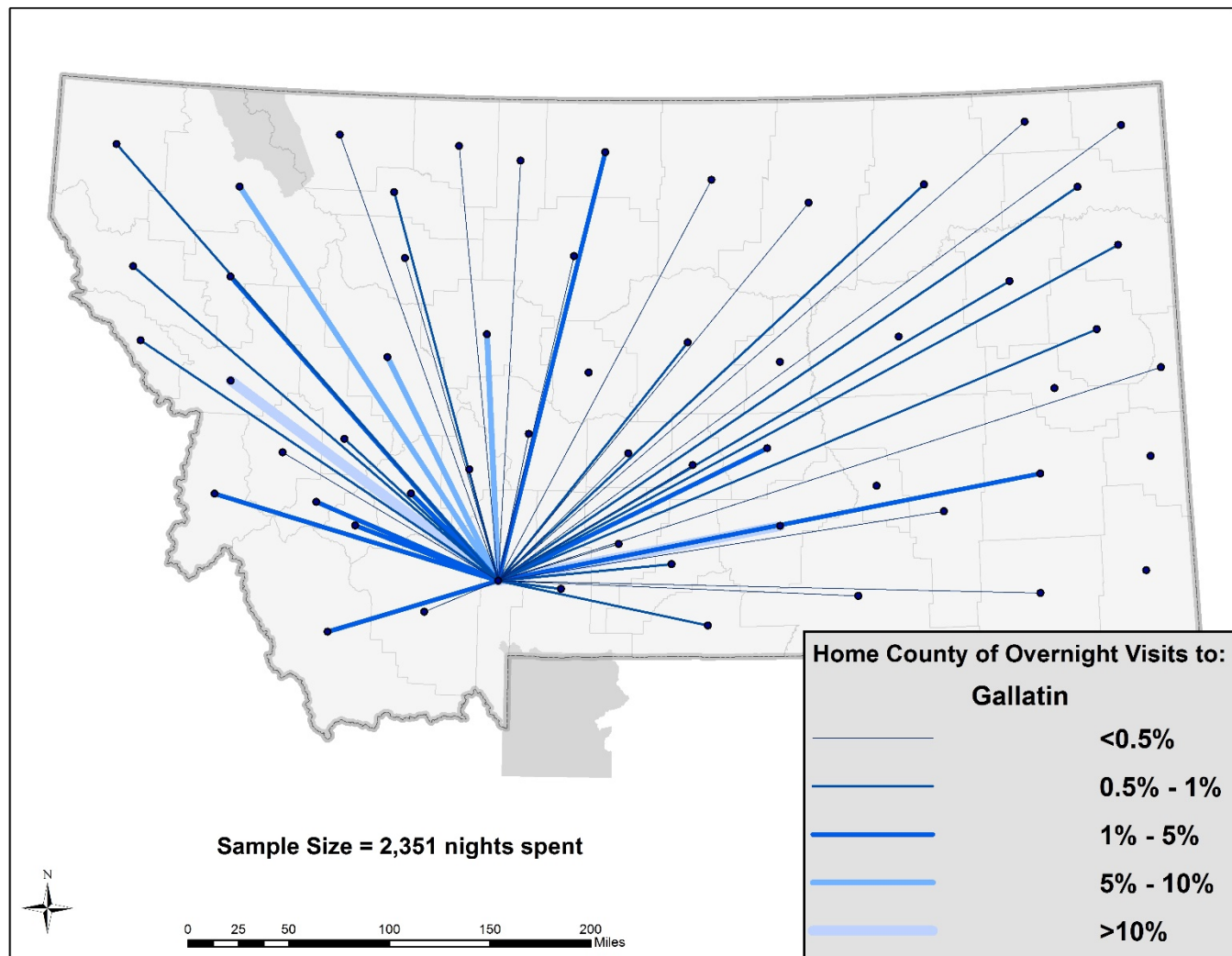
### Education level

|                       |     |                  |     |
|-----------------------|-----|------------------|-----|
| < high school         | --  | Undergrad degree | 41% |
| High school or GED    | 25% | Advanced degree  | 19% |
| Associate/trade/Cert. | 15% |                  |     |

### Household Income

|                      |     |                   |      |
|----------------------|-----|-------------------|------|
| < \$25,000 HH income | 6%  | \$100K to <\$150K | 115% |
| \$25K to < \$50K     | 25% | \$150K to <\$200K | 2%   |
| \$50K to < \$75K     | 22% | \$200K +          | 12%  |
| \$75K to < \$100K    | 19% |                   |      |

## Origins of residents who visited Gallatin County for OVERNIGHT TRIPS



## Percent of total overnight visitors from each county to Gallatin County (top 5 highlighted)

|            |      |               |       |              |       |             |       |
|------------|------|---------------|-------|--------------|-------|-------------|-------|
| Beaverhead | 1.6% | Flathead      | 5.2%  | Madison      | 0.9%  | Roosevelt   | 0.9%  |
| Big Horn   | 0.3% | Gallatin      | 11.8% | Meagher      | 0.1%  | Rosebud     | 0.3%  |
| Blaine     | 0.2% | Garfield      | 0.0%  | Mineral      | 0.8%  | Sanders     | 0.7%  |
| Broadwater | 0.3% | Glacier       | 0.2%  | Missoula     | 13.8% | Sheridan    | 0.3%  |
| Carbon     | 1.0% | Golden Valley | 0.0%  | Musselshell  | 1.8%  | Silver Bow  | 3.1%  |
| Carter     | 0.0% | Granite       | 0.4%  | Park         | 0.6%  | Stillwater  | 0.6%  |
| Cascade    | 6.5% | Hill          | 1.2%  | Petroleum    | 0.0%  | Sweet Grass | 0.3%  |
| Choteau    | 0.0% | Jefferson     | 1.6%  | Phillips     | 0.1%  | Teton       | 0.4%  |
| Custer     | 1.6% | Judith Basin  | 0.0%  | Pondera      | 0.9%  | Toole       | 0.4%  |
| Daniels    | 0.2% | Lake          | 2.6%  | Powder River | 0.2%  | Treasure    | 0.0%  |
| Dawson     | 0.9% | Lewis & Clark | 8.2%  | Powell       | 0.9%  | Valley      | 0.6%  |
| Deer Lodge | 1.3% | Liberty       | 0.0%  | Prairie      | 0.0%  | Wheatland   | 0.0%  |
| Fallon     | 0.0% | Lincoln       | 0.8%  | Ravalli      | 3.8%  | Wibaux      | 0.2%  |
| Fergus     | 0.9% | McCone        | 0.1%  | Richland     | 0.6%  | Yellowstone | 20.8% |

## Overnight Resident Travel to Missoula County, Montana

The purpose of this short summary is to further the understanding of Montana residents who spent time and money in Missoula County. *Missoula County has 11% of state overnights. Missoula has 82% of all overnights of the county; Seeley Lake has 11% of Missoula County overnights.*

### Number of Resident trips to Missoula County

**Business:** overnight = 188,800; Day = 609,000

**Vacation/rec./VFR:** overnight=296,000; Day=500,000

**Other type: overnight** = 19,100; Day = 243,000

### Overnight visitor dollars spent in Missoula County

|                                   | Destination \$       |
|-----------------------------------|----------------------|
| Fuel                              | \$12,588,000         |
| Lodging, camping                  | \$21,357,000         |
| Restaurants, bars                 | \$37,220,000         |
| Groceries                         | \$9,367,000          |
| Retail goods                      | \$21,112,000         |
| Services (fees, admissions, etc.) | \$8,601,000          |
| <b>TOTAL</b>                      | <b>\$110,245,000</b> |

### Type of lodging used on trip (percent of visitors)

|                      |     |              |    |
|----------------------|-----|--------------|----|
| Hotel/motel          | 36% | Rented home  | 1% |
| Bed & Breakfast      | 2%  | Rented room  | -- |
| Public land camping  | 7%  | Resort/condo | -- |
| Private campground   | 3%  | Guest ranch  | -- |
| Friend/relative home | 33% | Parking lot  | 3% |
| My second Home       | 6%  | Other        | 9% |

### Percent of visitors per month

|          |     |           |     |
|----------|-----|-----------|-----|
| January  | 4%  | July      | 16% |
| February | 8%  | August    | 9%  |
| March    | 10% | September | 9%  |
| April    | 7%  | October   | 10% |
| May      | 5%  | November  | 11% |
| June     | 7%  | December  | 5%  |

### Main reason for trip to Missoula County

Business: 14%

Vacation/recreation/VFR: 74%

Other type (i.e. shopping, medical): 12%

Average number of adults on trip: 2.18

Average number of children <18 on trip: 0.37

Average group size: 2.55

### Activities participated in during their trip in MT

|                    |     |                     |    |
|--------------------|-----|---------------------|----|
| Scenic driving     | 33% | Skiing/boarding     | 3% |
| Special dining out | 32% | Historical sites    | 3% |
| Recreational shop  | 30% | Bicycling           | 3% |
| Local brewery      | 23% | Attend wedding      | 3% |
| Day hiking         | 22% | Lewis & Clark sites | 3% |
| Nature photography | 16% | Fly fishing         | 2% |
| Sporting event     | 15% | Local distillery    | 2% |
| Watching wildlife  | 14% | Dino attractions    | 2% |
| Festival/events    | 14% | Backpacking         | 2% |
| Farmers markets    | 14% | Rock hounding       | 2% |
| Car/RV camping     | 13% | Visit Indian Res.   | 2% |
| Family event       | 12% | Golfing             | 2% |
| View art exhibits  | 8%  | Horseback riding    | 2% |
| Motor boating      | 7%  | Rock climbing       | 2% |
| Canoe/kayak        | 6%  | Bicycle touring     | 2% |
| Museums            | 5%  | snowshoeing         | 2% |
| Performing arts    | 5%  | XC skiing           | 1% |
| Other fishing      | 5%  | Rafting/floating    | 1% |
|                    |     | Birding             | 1% |

### Demographics

Gender: 53% male 47% female

Average respondent age: 53.28

### % within each age category

|       |    |       |     |       |     |
|-------|----|-------|-----|-------|-----|
| 18-29 | 7% | 40-49 | 23% | 60-69 | 27% |
| 30-39 | 8% | 50-59 | 24% | 70+   | 10% |

### Education level

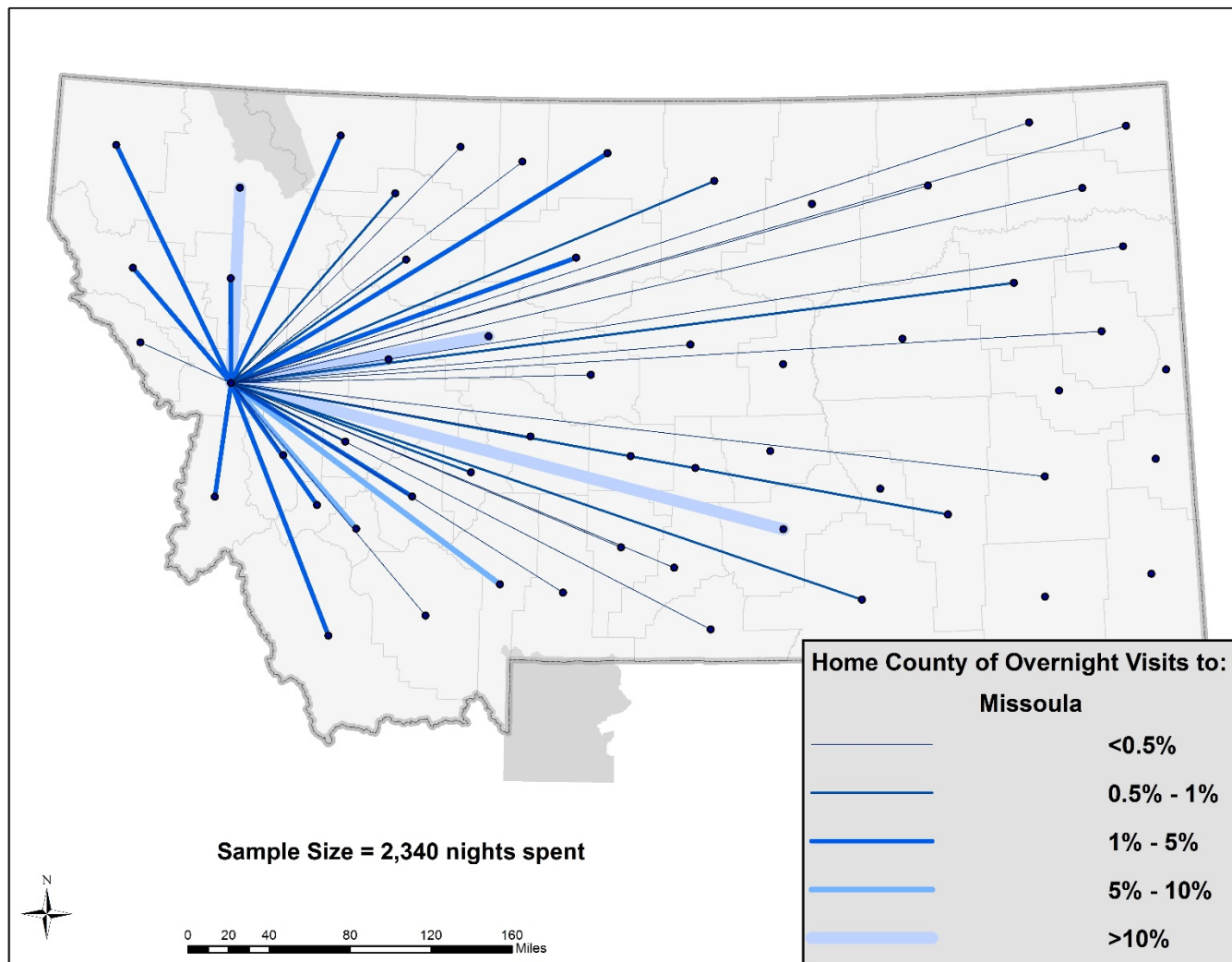
|                       |     |                  |     |
|-----------------------|-----|------------------|-----|
| < high school         | 1%  | Undergrad degree | 38% |
| High school or GED    | 16% | Advanced degree  | 23% |
| Associate/trade/Cert. | 22% |                  |     |

### Household Income

|                      |     |                   |     |
|----------------------|-----|-------------------|-----|
| < \$25,000 HH income | 11% | \$100K to <\$150K | 15% |
| \$25K to < \$50K     | 15% | \$150K to <\$200K | 7%  |
| \$50K to < \$75K     | 23% | \$200K +          | 4%  |
| \$75K to < \$100K    | 25% |                   |     |



## Origins of residents who visited Missoula County for OVERNIGHT TRIPS



## Percent of total overnight visitors from each county to Missoula County (top 5 highlighted)

|            |       |               |       |              |      |             |       |
|------------|-------|---------------|-------|--------------|------|-------------|-------|
| Beaverhead | 1.1%  | Flathead      | 10.4% | Madison      | 0.8% | Roosevelt   | 0.4%  |
| Big Horn   | 0.6%  | Gallatin      | 10.0% | Meagher      | 0.1% | Rosebud     | 0.6%  |
| Blaine     | 0.6%  | Garfield      | 0.0%  | Mineral      | 0.5% | Sanders     | 2.1%  |
| Broadwater | 0.7%  | Glacier       | 1.7%  | Missoula     | 9.1% | Sheridan    | 0.2%  |
| Carbon     | 0.5%  | Golden Valley | 0.0%  | Musselshell  | 0.0% | Silver Bow  | 6.1%  |
| Carter     | 0.0%  | Granite       | 0.1%  | Park         | 0.3% | Stillwater  | 0.2%  |
| Cascade    | 11.6% | Hill          | 1.4%  | Petroleum    | 0.0% | Sweet Grass | 0.2%  |
| Choteau    | 1.0%  | Jefferson     | 1.2%  | Phillips     | 0.0% | Teton       | 0.7%  |
| Custer     | 0.2%  | Judith Basin  | 0.1%  | Pondera      | 0.6% | Toole       | 0.5%  |
| Daniels    | 0.3%  | Lake          | 3.1%  | Powder River | 0.0% | Treasure    | 0.0%  |
| Dawson     | 0.1%  | Lewis & Clark | 10.5% | Powell       | 1.0% | Valley      | 0.2%  |
| Deer Lodge | 3.1%  | Liberty       | 0.3%  | Prairie      | 0.0% | Wheatland   | 0.0%  |
| Fallon     | 0.0%  | Lincoln       | 1.5%  | Ravalli      | 2.0% | Wibaux      | 0.0%  |
| Fergus     | 0.3%  | McCone        | 0.2%  | Richland     | 0.3% | Yellowstone | 13.7% |

## Overnight Resident Travel to Lewis & Clark County, Montana

The purpose of this short summary is to further the understanding of Montana residents who spent time and money in Lewis & Clark County. *Lewis & Clark County has 9% of state overnights. Helena has 76% of overnights, Lincoln has 9% of overnights, and Augusta has 8% of Lewis & Clark County overnights.*

### Number of Resident trips to Lewis & Clark County

**Business:** Overnight = 187,700; Day = 711,000

**Vacation/rec./VFR:** Overnight=181,500; Day=375,000

**Other type:** Overnight = 12,900; Day = 121,000

### Overnight visitor dollars spent in Lewis & Clark County

|                                   | Destination \$      |
|-----------------------------------|---------------------|
| Fuel                              | \$9,224,000         |
| Lodging, camping                  | \$15,648,000        |
| Restaurants, bars                 | \$27,272,000        |
| Groceries                         | \$6,863,000         |
| Retail goods                      | \$15,469,000        |
| Services (fees, admissions, etc.) | \$6,302,000         |
| <b>TOTAL</b>                      | <b>\$80,778,000</b> |

### Type of lodging used on trip (percent of visitors)

|                      |     |              |    |
|----------------------|-----|--------------|----|
| Hotel/motel          | 40% | Rented home  | 3% |
| Bed & Breakfast      | --  | Rented room  | -- |
| Public land camping  | 3%  | Resort/condo | -- |
| Private campground   | --  | Guest ranch  | -- |
| Friend/relative home | 29% | Parking lot  | 5% |
| My second Home       | 13% | Other        | 8% |

### Percent of visitors per month

|          |     |           |     |
|----------|-----|-----------|-----|
| January  | 9%  | July      | 10% |
| February | 8%  | August    | 11% |
| March    | 17% | September | 7%  |
| April    | 6%  | October   | 13% |
| May      | 2%  | November  | 8%  |
| June     | 3%  | December  | 6%  |

### Main reason for trip Lewis & Clark County

Business: 22%

Vacation/recreation/VFR: 73%

Other type (i.e. shopping, medical): 5%

Average number of adults on trip: 1.8

Average number of children <18 on trip: 0.3

Average group size: 2.6

### Activities participated in during their trip in MT

|                    |     |                     |    |
|--------------------|-----|---------------------|----|
| Scenic driving     | 34% | Sporting event      | 7% |
| Special dining out | 29% | Bicycling           | 7% |
| Recreational shop  | 24% | Nature photography  | 6% |
| Local brewery      | 18% | Farmers markets     | 5% |
| Watching wildlife  | 18% | Rafting/floating    | 5% |
| Day hiking         | 16% | Lewis & Clark sites | 5% |
| Festival/events    | 14% | Geocaching          | 5% |
| View art exhibits  | 14% | Museums             | 4% |
| Car/RV camping     | 12% | Performing arts     | 4% |
| Historical sites   | 11% | Ski/board           | 3% |
| Other fishing      | 11% | Hunting             | 3% |
| OHV/ATV            | 9%  | Mt. biking          | 2% |
| Fly fishing        | 8%  | Motor boating       | 1% |
| Family event       | 8%  | Attend wedding      | 1% |

### Demographics

Gender: 44% male 56% female

Average respondent age: 49.98

### % within each age category

|       |     |       |     |       |     |
|-------|-----|-------|-----|-------|-----|
| 18-29 | 13% | 40-49 | 20% | 60-69 | 23% |
| 30-39 | 14% | 50-59 | 25% | 70+   | 6%  |

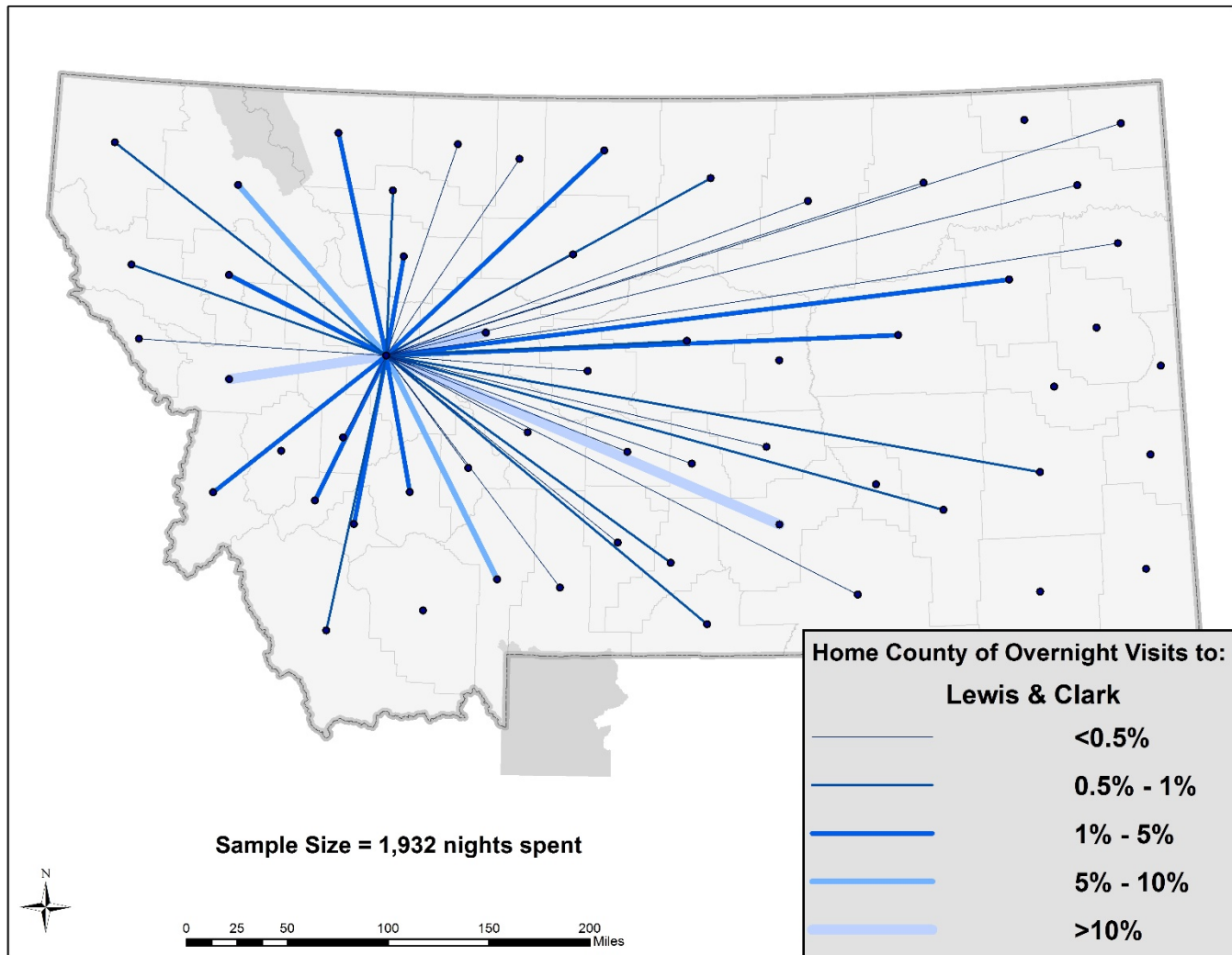
### Education level

|                       |     |                  |     |
|-----------------------|-----|------------------|-----|
| < high school         | --  | Undergrad degree | 43% |
| High school or GED    | 26% | Advanced degree  | 14% |
| Associate/trade/Cert. | 17% |                  |     |

### Household Income

|                      |     |                   |     |
|----------------------|-----|-------------------|-----|
| < \$25,000 HH income | 6%  | \$100K to <\$150K | 9%  |
| \$25K to < \$50K     | 31% | \$150K to <\$200K | 11% |
| \$50K to < \$75K     | 33% | \$200K +          | 1%  |
| \$75K to < \$100K    | 11% |                   |     |

## Origins of residents who visited Lewis & Clark County for OVERNIGHT TRIPS



## Percent of total overnight visitors from each county to Lewis & Clark County (top 5 highlighted)

|            |       |               |      |              |       |             |       |
|------------|-------|---------------|------|--------------|-------|-------------|-------|
| Beaverhead | 0.5%  | Flathead      | 5.5% | Madison      | 1.2%  | Roosevelt   | 0.4%  |
| Big Horn   | 0.2%  | Gallatin      | 8.5% | Meagher      | 0.1%  | Rosebud     | 0.6%  |
| Blaine     | 0.8%  | Garfield      | 2.8% | Mineral      | 0.1%  | Sanders     | 0.5%  |
| Broadwater | 0.4%  | Glacier       | 2.2% | Missoula     | 19.7% | Sheridan    | 0.2%  |
| Carbon     | 0.6%  | Golden Valley | 0.1% | Musselshell  | 0.1%  | Silver Bow  | 3.5%  |
| Carter     | 0.0%  | Granite       | 0.0% | Park         | 0.5%  | Stillwater  | 0.5%  |
| Cascade    | 15.9% | Hill          | 2.3% | Petroleum    | 0.0%  | Sweet Grass | 0.1%  |
| Choteau    | 0.2%  | Jefferson     | 1.8% | Phillips     | 0.4%  | Teton       | 3.1%  |
| Custer     | 1.0%  | Judith Basin  | 0.4% | Pondera      | 0.8%  | Toole       | 0.4%  |
| Daniels    | 0.0%  | Lake          | 2.1% | Powder River | 0.0%  | Treasure    | 0.0%  |
| Dawson     | 0.0%  | Lewis & Clark | 6.1% | Powell       | 0.1%  | Valley      | 0.2%  |
| Deer Lodge | 1.0%  | Liberty       | 0.1% | Prairie      | 0.0%  | Wheatland   | 0.2%  |
| Fallon     | 0.0%  | Lincoln       | 0.5% | Ravalli      | 1.8%  | Wibaux      | 0.0%  |
| Fergus     | 0.6%  | McCone        | 0.0% | Richland     | 0.3%  | Yellowstone | 11.8% |



## Overnight Resident Travel to Flathead County, Montana

The purpose of this short summary is to further the understanding of Montana residents who spent time and money in Flathead County. *Flathead County has 9% of state overnights. Kalispell has 55% of all county overnights; Whitefish 19%; Bigfork 8%; Hungry Horse 4%; and Polebridge 3% of Flathead county overnights.*

### Number of Resident trips to Flathead County

**Business:** overnight = 119,800; Day = 102,000

**Vacation/rec./VFR:** overnight=192,400; Day=219,000

**Other type: overnight** = 10,200; Day = 149,000

### Overnight visitor dollars spent in Flathead County

|                                   | Destination\$       |
|-----------------------------------|---------------------|
| Fuel                              | \$8,044,000         |
| Lodging, camping                  | \$13,647,000        |
| Restaurants, bars                 | \$23,784,000        |
| Groceries                         | \$5,986,000         |
| Retail goods                      | \$13,491,000        |
| Services (fees, admissions, etc.) | \$5,496,000         |
| <b>TOTAL</b>                      | <b>\$70,448,000</b> |

### Type of lodging used on trip (percent of visitors)

|                      |     |              |     |
|----------------------|-----|--------------|-----|
| Hotel/motel          | 32% | Rented home  | 10% |
| Bed & Breakfast      | --  | Rented room  | --  |
| Public land camping  | 5%  | Resort/condo | 5%  |
| Private campground   | 4%  | Guest ranch  | --  |
| Friend/relative home | 36% | Parking lot  | 2%  |
| My second Home       | 4%  | Other        | 2%  |

### Percent of visitors per month

|          |     |           |     |
|----------|-----|-----------|-----|
| January  | 10% | July      | 11% |
| February | 10% | August    | 9%  |
| March    | 7%  | September | 8%  |
| April    | 5%  | October   | 10% |
| May      | 6%  | November  | 4%  |
| June     | 10% | December  | 11% |

### Main reason for trip to Flathead County

Business: 16%

Vacation/recreation/VFR: 73%

Other type (i.e. shopping, medical): 11%

Average number of children <18 on trip: 0.61

Average group size: 2.69

### Activities participated in during their trip in MT

|                    |     |                     |    |
|--------------------|-----|---------------------|----|
| Scenic driving     | 42% | Bicycling           | 4% |
| Special dining out | 29% | Visit Indian Res.   | 4% |
| Day hiking         | 28% | Attend wedding      | 4% |
| Recreational shop  | 23% | OHV/ATV             | 3% |
| Local brewery      | 21% | Other fishing       | 3% |
| Watching wildlife  | 20% | Snowshoe            | 3% |
| Motor boating      | 15% | Ghost towns         | 3% |
| Nature photography | 12% | Dino attractions    | 3% |
| Canoe/kayaking     | 12% | Backpacking         | 2% |
| Family event       | 12% | Road/tour biking    | 2% |
| Historical sites   | 11% | Motorcycle tour     | 2% |
| Festival/events    | 10% | Visit hot springs   | 2% |
| Farmers market     | 10% | XC ski              | 2% |
| Car/RV camping     | 8%  | Performing arts     | 2% |
| Golfing            | 6%  | Museums             | 2% |
| ski/snowboarding   | 6%  | Local distillery    | 2% |
| View art exhibits  | 6%  | Horseback riding    | 1% |
| Fly fishing        | 5%  | Mt. biking          | 1% |
| Sporting events    | 5%  | Ice fishing         | 1% |
| Hunting            | 4%  | Lewis & Clark sites | 1% |
| Birding            | 4%  |                     |    |

### Demographics

Gender: 58% male 42% female

Average respondent age: 53.23

### % within each age category

|       |     |       |     |       |     |
|-------|-----|-------|-----|-------|-----|
| 18-29 | 9%  | 40-49 | 14% | 60-69 | 25% |
| 30-39 | 16% | 50-59 | 23% | 70+   | 13% |

### Education level

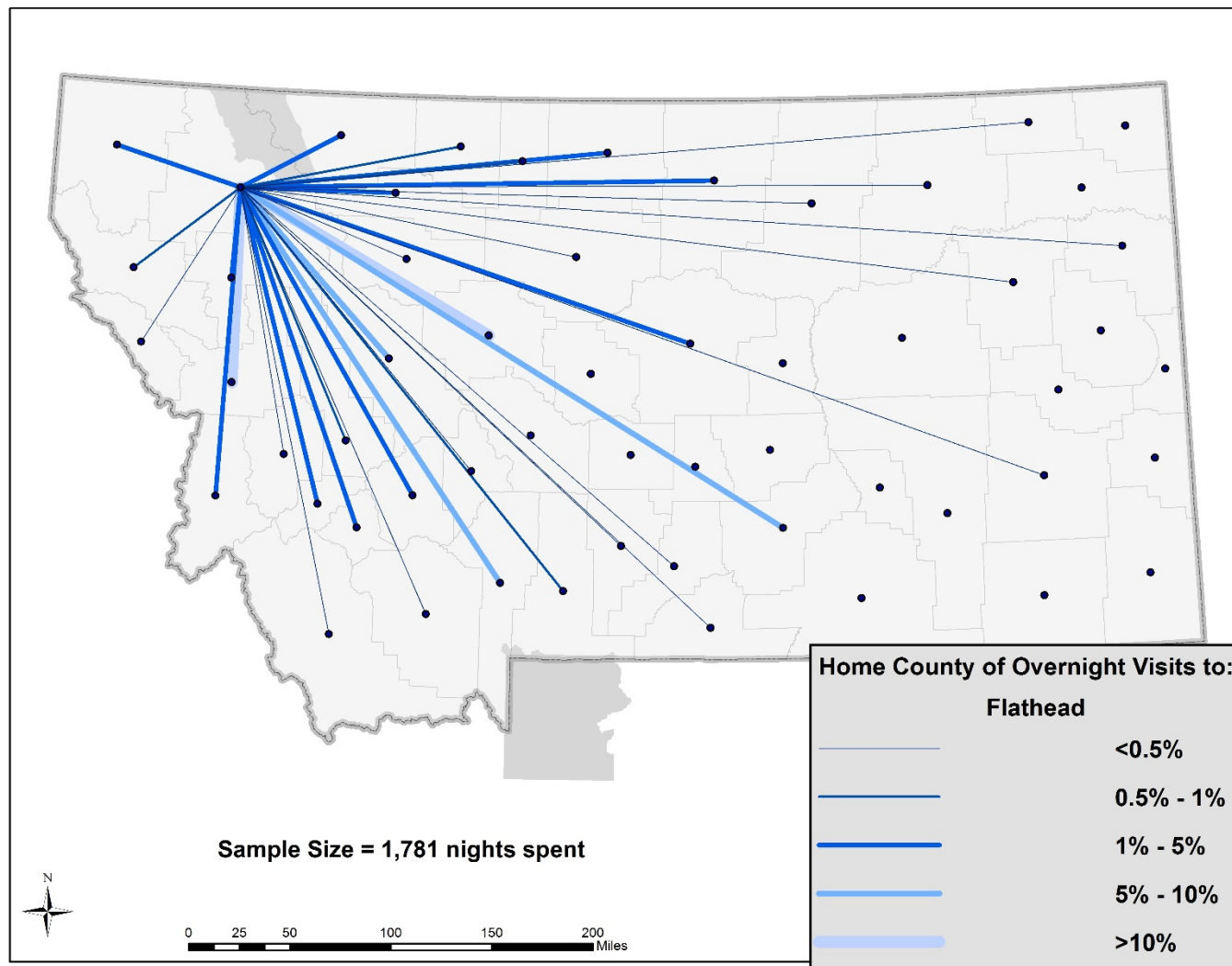
|                       |     |                  |     |
|-----------------------|-----|------------------|-----|
| < high school         | --  | Undergrad degree | 49% |
| High school or GED    | 24% | Advanced degree  | 15% |
| Associate/trade/Cert. | 13% |                  |     |

### Household Income

|                      |     |                   |     |
|----------------------|-----|-------------------|-----|
| < \$25,000 HH income | 12% | \$100K to <\$150K | 16% |
| \$25K to < \$50K     | 27% | \$150K to <\$200K | 6%  |
| \$50K to < \$75K     | 13% | \$200K +          | 5%  |
| \$75K to < \$100K    | 22% |                   |     |

Average number of adults on trip: 1.84

## Origins of residents who visited Flathead County for OVERNIGHT TRIPS



## Percent of total overnight visitors from each county to Flathead County (top 5 highlighted)

|            |       |               |      |              |       |             |      |
|------------|-------|---------------|------|--------------|-------|-------------|------|
| Beaverhead | 0.4%  | Flathead      | 7.6% | Madison      | 0.4%  | Roosevelt   | 0.0% |
| Big Horn   | 0.0%  | Gallatin      | 8.2% | Meagher      | 0.0%  | Rosebud     | 0.0% |
| Blaine     | 1.2%  | Garfield      | 0.0% | Mineral      | 0.1%  | Sanders     | 0.8% |
| Broadwater | 0.3%  | Glacier       | 2.7% | Missoula     | 23.8% | Sheridan    | 0.0% |
| Carbon     | 0.2%  | Golden Valley | 0.0% | Musselshell  | 0.0%  | Silver Bow  | 1.8% |
| Carter     | 0.0%  | Granite       | 0.1% | Park         | 0.7%  | Stillwater  | 0.3% |
| Cascade    | 11.9% | Hill          | 3.4% | Petroleum    | 0.0%  | Sweet Grass | 0.1% |
| Choteau    | 0.4%  | Jefferson     | 1.3% | Phillips     | 0.4%  | Teton       | 0.1% |
| Custer     | 0.4%  | Judith Basin  | 0.0% | Pondera      | 1.7%  | Toole       | 1.0% |
| Daniels    | 0.4%  | Lake          | 3.4% | Powder River | 0.0%  | Treasure    | 0.0% |
| Dawson     | 0.0%  | Lewis & Clark | 7.8% | Powell       | 0.8%  | Valley      | 0.1% |
| Deer Lodge | 1.1%  | Liberty       | 0.7% | Prairie      | 0.0%  | Wheatland   | 0.0% |
| Fallon     | 0.0%  | Lincoln       | 4.2% | Ravalli      | 4.1%  | Wibaux      | 0.0% |
| Fergus     | 1.5%  | McCone        | 0.4% | Richland     | 0.4%  | Yellowstone | 6.0% |

## Overnight Resident Travel to Cascade County, Montana

The purpose of this short summary is to further the understanding of Montana residents who spent time and money in Cascade County. *Cascade County has 7% of MT overnights. Great Falls represents 88% of all overnights in Cascade County; Cascade 4%; and Neihart represents 3% of overnights in Cascade County.*

### Number of Resident trips to Cascade County

**Business:** overnight = 147,500; Day = 609,000

**Vacation/rec./VFR:** overnight=154,900; Day=156,000

**Other type:** overnight = 8,100; Day = 93,000

### Overnight visitor dollars spent in Cascade County

|                                   | Destination \$      |
|-----------------------------------|---------------------|
| Fuel                              | \$7,510,000         |
| Lodging, camping                  | \$12,742,000        |
| Restaurants, bars                 | \$22,206,000        |
| Groceries                         | \$5,588,000         |
| Retail goods                      | \$12,596,000        |
| Services (fees, admissions, etc.) | \$5,131,000         |
| <b>TOTAL</b>                      | <b>\$65,773,000</b> |

### Type of lodging used on trip (percent of visitors)

|                      |     |              |    |
|----------------------|-----|--------------|----|
| Hotel/motel          | 53% | Rented home  | -- |
| Bed & Breakfast      | 1%  | Rented room  | -- |
| Public land camping  | 4%  | Resort/condo | -- |
| Private campground   | --  | Guest ranch  | -- |
| Friend/relative home | 38% | Parking lot  | 2% |
| My second Home       | --  | Other        | -- |

### Percent of visitors per month

|          |     |           |     |
|----------|-----|-----------|-----|
| January  | 16% | July      | 17% |
| February | 15% | August    | 1%  |
| March    | 21% | September | 7%  |
| April    | 11% | October   | 9%  |
| May      | 1%  | November  | 3%  |
| June     | 2%  | December  | 7%  |

### Main reason for trip to Cascade County

Business: 26%

Vacation/recreation/VFR: 64%

Other type (i.e. shopping, medical): 10%

Average number of adults on trip: 1.7  
Average number of children <18 on trip: 0.43  
Average group size: 2.11

### Activities participated in during their trip in MT

|                     |     |                    |    |
|---------------------|-----|--------------------|----|
| Recreational shop   | 23% | Museums            | 4% |
| Scenic driving      | 21% | Nature photography | 3% |
| Special dining out  | 19% | Canoe/kayaking     | 3% |
| Sporting events     | 18% | Other fishing      | 3% |
| Family event        | 13% | ski/snowboarding   | 3% |
| Day hiking          | 7%  | Ice fishing        | 3% |
| Festival/events     | 7%  | Farmers market     | 3% |
| Local brewery       | 7%  | Visit Indian Res.  | 3% |
| Car/RV camping      | 6%  | Motor boating      | 2% |
| OHV/ATV             | 6%  | Performing arts    | 2% |
| Hunting             | 5%  | Horseback riding   | 1% |
| Lewis & Clark sites | 5%  | Watching wildlife  | 1% |
| Historical sites    | 5%  | Golfing            | 1% |
| Fly fishing         | 4%  | Motorcycle tour    | 1% |
| Visit hot springs   | 4%  | View art exhibits  | 1% |
| Snowmobile          | 4%  | Dino attractions   | 1% |

### Demographics

Gender: 57% male 43% female

Average respondent age: 54.57

### % within each age category

|       |     |       |     |       |     |
|-------|-----|-------|-----|-------|-----|
| 18-29 | 1%  | 40-49 | 27% | 60-69 | 19% |
| 30-39 | 10% | 50-59 | 34% | 70+   | 9%  |

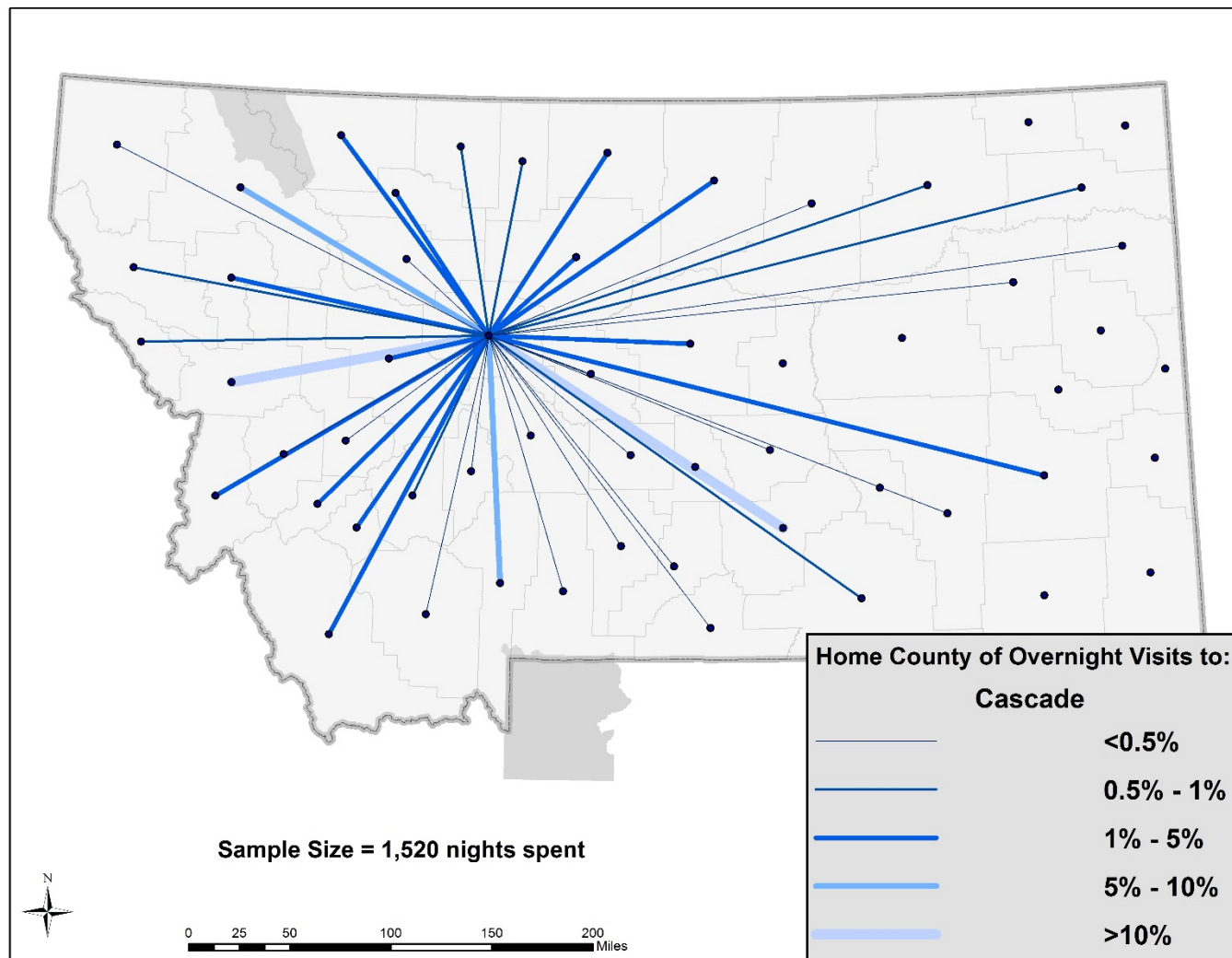
### Education level

|                       |     |                  |     |
|-----------------------|-----|------------------|-----|
| < high school         | --  | Undergrad degree | 35% |
| High school or GED    | 27% | Advanced degree  | 21% |
| Associate/trade/Cert. | 18% |                  |     |

### Household Income

|                      |     |                   |     |
|----------------------|-----|-------------------|-----|
| < \$25,000 HH income | 8%  | \$100K to <\$150K | 16% |
| \$25K to < \$50K     | 17% | \$150K to <\$200K | 5%  |
| \$50K to < \$75K     | 24% | \$200K +          | 2%  |
| \$75K to < \$100K    | 30% |                   |     |

## Origins of residents who visited Cascade County for OVERNIGHT TRIPS



## Percent of total overnight visitors from each county to Cascade County (top 5 highlighted)

|            |       |               |      |              |       |             |       |
|------------|-------|---------------|------|--------------|-------|-------------|-------|
| Beaverhead | 1.5%  | Flathead      | 7.3% | Madison      | 0.1%  | Roosevelt   | 0.5%  |
| Big Horn   | 0.6%  | Gallatin      | 9.4% | Meagher      | 0.1%  | Rosebud     | 0.2%  |
| Blaine     | 1.3%  | Garfield      | 0.0% | Mineral      | 0.6%  | Sanders     | 0.8%  |
| Broadwater | 0.4%  | Glacier       | 4.7% | Missoula     | 10.7% | Sheridan    | 0.0%  |
| Carbon     | 0.1%  | Golden Valley | 0.0% | Musselshell  | 0.3%  | Silver Bow  | 4.1%  |
| Carter     | 0.0%  | Granite       | 0.2% | Park         | 0.3%  | Stillwater  | 0.5%  |
| Cascade    | 10.7% | Hill          | 4.3% | Petroleum    | 0.0%  | Sweet Grass | 0.1%  |
| Choteau    | 1.4%  | Jefferson     | 0.7% | Phillips     | 0.5%  | Teton       | 0.1%  |
| Custer     | 1.6%  | Judith Basin  | 0.1% | Pondera      | 1.3%  | Toole       | 0.5%  |
| Daniels    | 0.0%  | Lake          | 3.2% | Powder River | 0.0%  | Treasure    | 0.0%  |
| Dawson     | 0.0%  | Lewis & Clark | 4.2% | Powell       | 0.1%  | Valley      | 1.0%  |
| Deer Lodge | 3.1%  | Liberty       | 0.6% | Prairie      | 0.0%  | Wheatland   | 0.1%  |
| Fallon     | 0.0%  | Lincoln       | 0.4% | Ravalli      | 1.6%  | Wibaux      | 0.0%  |
| Fergus     | 1.3%  | McCone        | 0.1% | Richland     | 0.4%  | Yellowstone | 19.1% |

## Overnight Resident Travel within Glacier Country Travel Region

The purpose of this short summary is to further the understanding of Montana residents who spent time and money in Glacier Country travel region at least 50 miles from their home. Glacier Country receives 29% of resident spending in MT and 27% of all resident overnights in MT.

### % of nights for each county within Glacier Country:

Flathead 32%; Lake 9%; Lincoln 5%; Mineral 1%; Missoula 42%; Ravalli 6%; Sanders 4%

### Overnight visitor dollars spent in Glacier Country

|                                   | Destination \$       |
|-----------------------------------|----------------------|
| Fuel                              | \$28,707,000         |
| Lodging, camping                  | \$48,703,000         |
| Restaurants, bars                 | \$84,879,000         |
| Groceries                         | \$21,361,000         |
| Retail goods                      | \$48,146,000         |
| Services (fees, admissions, etc.) | \$19,614,000         |
| <b>TOTAL</b>                      | <b>\$251,410,000</b> |

### Type of lodging used on trip (percent of visitors)

|                      |     |              |    |
|----------------------|-----|--------------|----|
| Hotel/motel          | 26% | Rented home  | 5% |
| Bed & Breakfast      | 1%  | Rented room  | -- |
| Public land camping  | 10% | Resort/condo | 2% |
| Private campground   | 6%  | Guest ranch  | 1% |
| Friend/relative home | 37% | Parking lot  | 2% |
| My second Home       | 5%  | Other        | 6% |

### Percent of visitors per month

|          |     |           |     |
|----------|-----|-----------|-----|
| January  | 7%  | July      | 19% |
| February | 7%  | August    | 9%  |
| March    | 8%  | September | 8%  |
| April    | 6%  | October   | 8%  |
| May      | 5%  | November  | 8%  |
| June     | 10% | December  | 6%  |

### Main reason for trip to Glacier Country

Business: 14%

Vacation/recreation/VFR: 76%

Other type (i.e. shopping, medical): 10%

Average number of adults on trip: 2.21

Average number of children <18 on trip: 0.49

Average group size: 2.62

### Activities participated in during their trip in MT

|                    |     |                     |     |
|--------------------|-----|---------------------|-----|
| Scenic driving     | 37% | Backpacking         | 3%  |
| Day hiking         | 24% | Birding             | 3%  |
| Special dining out | 23% | OHV/ATV             | 3%  |
| Watching wildlife  | 22% | Performing arts     | 3%  |
| Recreational shop  | 22% | Horseback riding    | 2%  |
| Local brewery      | 18% | Hunting             | 2%  |
| Car/RV camping     | 16% | Road/tour biking    | 2%  |
| Nature photography | 16% | Visit hot springs   | 2%  |
| Festival/events    | 13% | Dino attractions    | 2%  |
| Motor boating      | 12% | Attend wedding      | 2%  |
| Family event       | 12% | Rock climbing       | 1%  |
| Farmers market     | 11% | Mt. biking          | 1%  |
| Canoe/kayaking     | 10% | Rock hounding       | 1%  |
| Other fishing      | 9%  | Motorcycle touring  | 1%  |
| Sporting events    | 9%  | Rafting/floating    | 1%  |
| View art exhibits  | 8%  | Snowmobile          | 1%  |
| Visit Indian Res.  | 7%  | XC ski              | 1%  |
| Historical sites   | 7%  | Snowshoe            | 1%  |
| Bicycling          | 4%  | Lewis & Clark sites | 1%  |
| Golfing            | 4%  | Ghost towns         | 1%  |
| Fly fishing        | 4%  | Local distillery    | 1%  |
| ski/snowboarding   | 4%  | Ice fishing         | <1% |
| Museums            | 4%  |                     |     |

### Demographics

Gender: 53% male 47% female

Average respondent age: 52.6

### % within each age category

|       |     |       |     |       |     |
|-------|-----|-------|-----|-------|-----|
| 18-29 | 9%  | 40-49 | 20% | 60-69 | 26% |
| 30-39 | 12% | 50-59 | 22% | 70+   | 12% |

### Education level

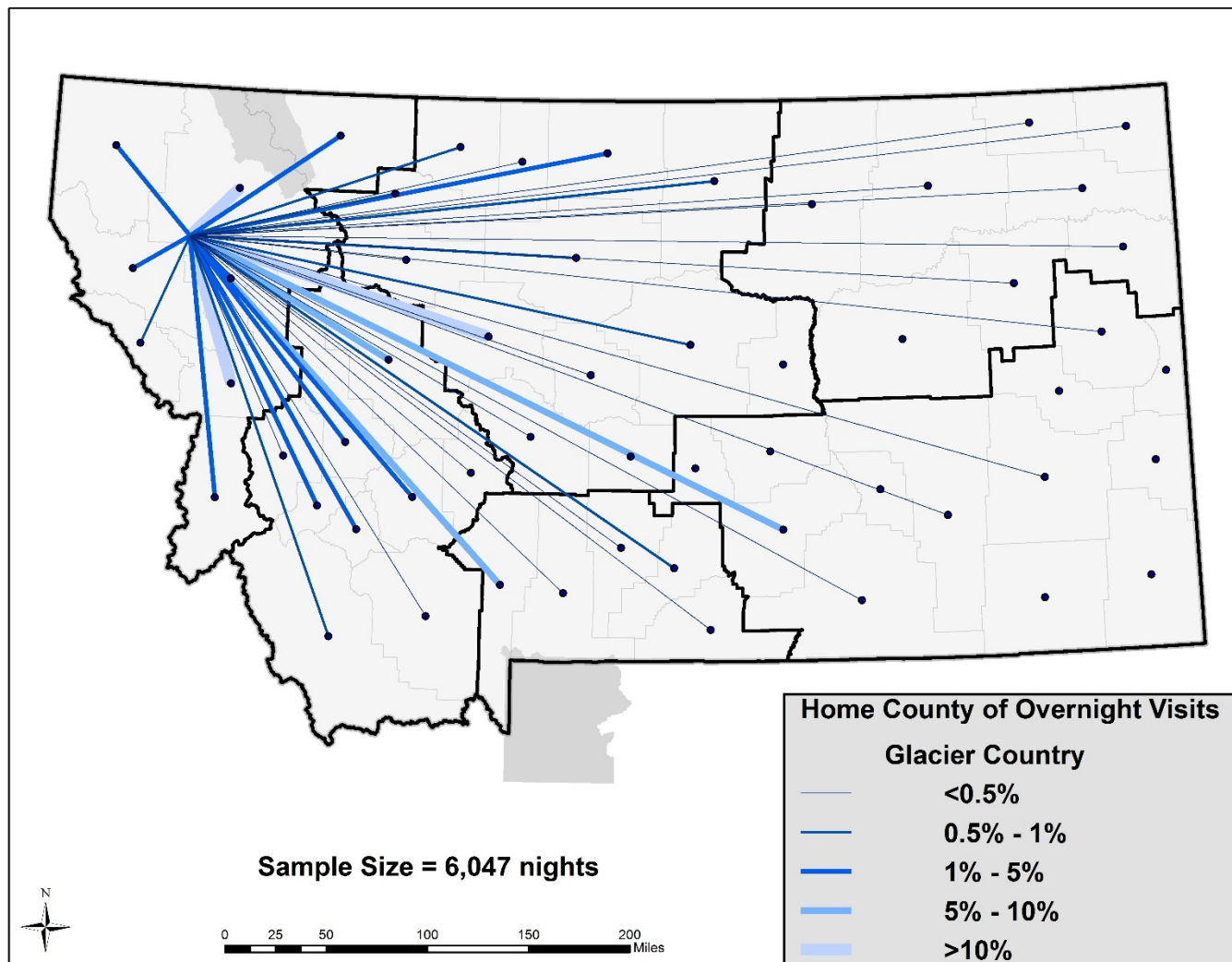
|                       |     |                  |     |
|-----------------------|-----|------------------|-----|
| < high school         | <1% | Undergrad degree | 39% |
| High school or GED    | 21% | Advanced degree  | 21% |
| Associate/trade/Cert. | 19% |                  |     |

### Household Income

|                      |     |                   |     |
|----------------------|-----|-------------------|-----|
| < \$25,000 HH income | 11% | \$100K to <\$150K | 15% |
| \$25K to < \$50K     | 21% | \$150K to <\$200K | 7%  |
| \$50K to < \$75K     | 20% | \$200K +          | 4%  |
| \$75K to < \$100K    | 24% |                   |     |



## Origins of residents who visited Glacier Country for OVERNIGHT TRIPS



## Percent of total overnight visitors from each county to Glacier Country Travel Region (top 5 highlighted)

|            |       |               |       |              |       |             |      |
|------------|-------|---------------|-------|--------------|-------|-------------|------|
| Beaverhead | 0.9%  | Flathead      | 11.0% | Madison      | 0.4%  | Roosevelt   | 0.2% |
| Big Horn   | 0.3%  | Gallatin      | 8.6%  | Meagher      | 0.0%  | Rosebud     | 0.2% |
| Blaine     | 0.8%  | Garfield      | 0.0%  | Mineral      | 0.6%  | Sanders     | 1.5% |
| Broadwater | 0.4%  | Glacier       | 2.0%  | Missoula     | 15.5% | Sheridan    | 0.1% |
| Carbon     | 0.3%  | Golden Valley | 0.0%  | Musselshell  | 0.0%  | Silver Bow  | 3.7% |
| Carter     | 0.0%  | Granite       | 0.1%  | Park         | 0.5%  | Stillwater  | 0.6% |
| Cascade    | 11.3% | Hill          | 1.9%  | Petroleum    | 0.0%  | Sweet Grass | 0.1% |
| Choteau    | 0.6%  | Jefferson     | 1.5%  | Phillips     | 0.3%  | Teton       | 0.3% |
| Custer     | 0.3%  | Judith Basin  | 0.0%  | Pondera      | 0.8%  | Toole       | 0.5% |
| Daniels    | 0.2%  | Lake          | 3.7%  | Powder River | 0.0%  | Treasure    | 0.0% |
| Dawson     | 0.1%  | Lewis & Clark | 9.1%  | Powell       | 1.4%  | Valley      | 0.1% |
| Deer Lodge | 1.9%  | Liberty       | 0.3%  | Prairie      | 0.0%  | Wheatland   | 0.0% |
| Fallon     | 0.0%  | Lincoln       | 3.6%  | Ravalli      | 3.6%  | Wibaux      | 0.0% |
| Fergus     | 0.6%  | McCone        | 0.3%  | Richland     | 0.3%  | Yellowstone | 9.6% |

## Overnight Resident Travel within Southwest MT Travel Region

The purpose of this short summary is to further the understanding of Montana residents who spent time and money in the Southwest MT travel region at least 50 miles from their home. Southwest MT travel region receives 19% of resident spending in MT and 19% of all resident overnights in MT.

### % of nights for each county within SW MT region:

Beaverhead 11%; Broadwater 2%; Deer Lodge 5%; Granite 4%; Jefferson 2%; Lewis & Clark 48%; Madison 6%; Powell 3%; Silver Bow 19%

### Overnight visitor dollars spent in SW MT region

|                                   | Destination \$       |
|-----------------------------------|----------------------|
| Fuel                              | \$18,856,000         |
| Lodging, camping                  | \$31,991,000         |
| Restaurants, bars                 | \$55,753,000         |
| Groceries                         | \$14,031,000         |
| Retail goods                      | \$31,625,000         |
| Services (fees, admissions, etc.) | \$12,883,000         |
| <b>TOTAL</b>                      | <b>\$165,139,000</b> |

### Type of lodging used on trip (percent of visitors)

|                      |     |              |     |
|----------------------|-----|--------------|-----|
| Hotel/motel          | 33% | Rented home  | 1%  |
| Bed & Breakfast      | --  | Rented room  | 1%  |
| Public land camping  | 6%  | Resort/condo | 2%  |
| Private campground   | 10% | Guest ranch  | <1% |
| Friend/relative home | 36% | Parking lot  | 2%  |
| My second Home       | 6%  | Other        | 3%  |

### Percent of visitors per month

|          |     |           |     |
|----------|-----|-----------|-----|
| January  | 8%  | July      | 14% |
| February | 6%  | August    | 10% |
| March    | 14% | September | 6%  |
| April    | 9%  | October   | 8%  |
| May      | 4%  | November  | 7%  |
| June     | 6%  | December  | 8%  |

### Main reason for trip to SW MT region

Business: 18%

Vacation/recreation/VFR: 74%

Other type (i.e. shopping, medical): 7%

Average number of adults on trip: 2.10

Average number of children <18 on trip: 0.46

Average group size: 2.56

### Activities participated in during their trip in MT

|                    |     |                     |     |
|--------------------|-----|---------------------|-----|
| Scenic driving     | 41% | Hunting             | 5%  |
| Special dining out | 23% | Motor boating       | 5%  |
| Day hiking         | 22% | Farmers market      | 5%  |
| Recreational shop  | 20% | Lewis & Clark sites | 5%  |
| Watching wildlife  | 18% | Performing arts     | 4%  |
| Local brewery      | 17% | Bicycling           | 3%  |
| Car/RV camping     | 16% | OHV/ATV             | 3%  |
| Festival/events    | 15% | Geocaching          | 2%  |
| Historical sites   | 13% | Rock climbing       | 2%  |
| Nature photography | 11% | Mt. biking          | 2%  |
| View art exhibits  | 10% | Rock hounding       | 2%  |
| Family event       | 10% | Ice fishing         | 2%  |
| Fly fishing        | 8%  | Ghost towns         | 2%  |
| Other fishing      | 8%  | Attend wedding      | 2%  |
| Visit hot springs  | 8%  | Horseback riding    | 1%  |
| Museums            | 8%  | Birding             | 1%  |
| ski/snowboarding   | 7%  | Snowshoe            | 1%  |
| Local distillery   | 7%  | Dino attractions    | 1%  |
| Sporting events    | 7%  | Backpacking         | <1% |
| Rafting/floating   | 6%  | Indian reservation  | <1% |

### Demographics

Gender: 49% male 51% female

Average respondent age: 50.46

### % within each age category

|       |     |       |     |       |     |
|-------|-----|-------|-----|-------|-----|
| 18-29 | 10% | 40-49 | 19% | 60-69 | 25% |
| 30-39 | 18% | 50-59 | 21% | 70+   | 8%  |

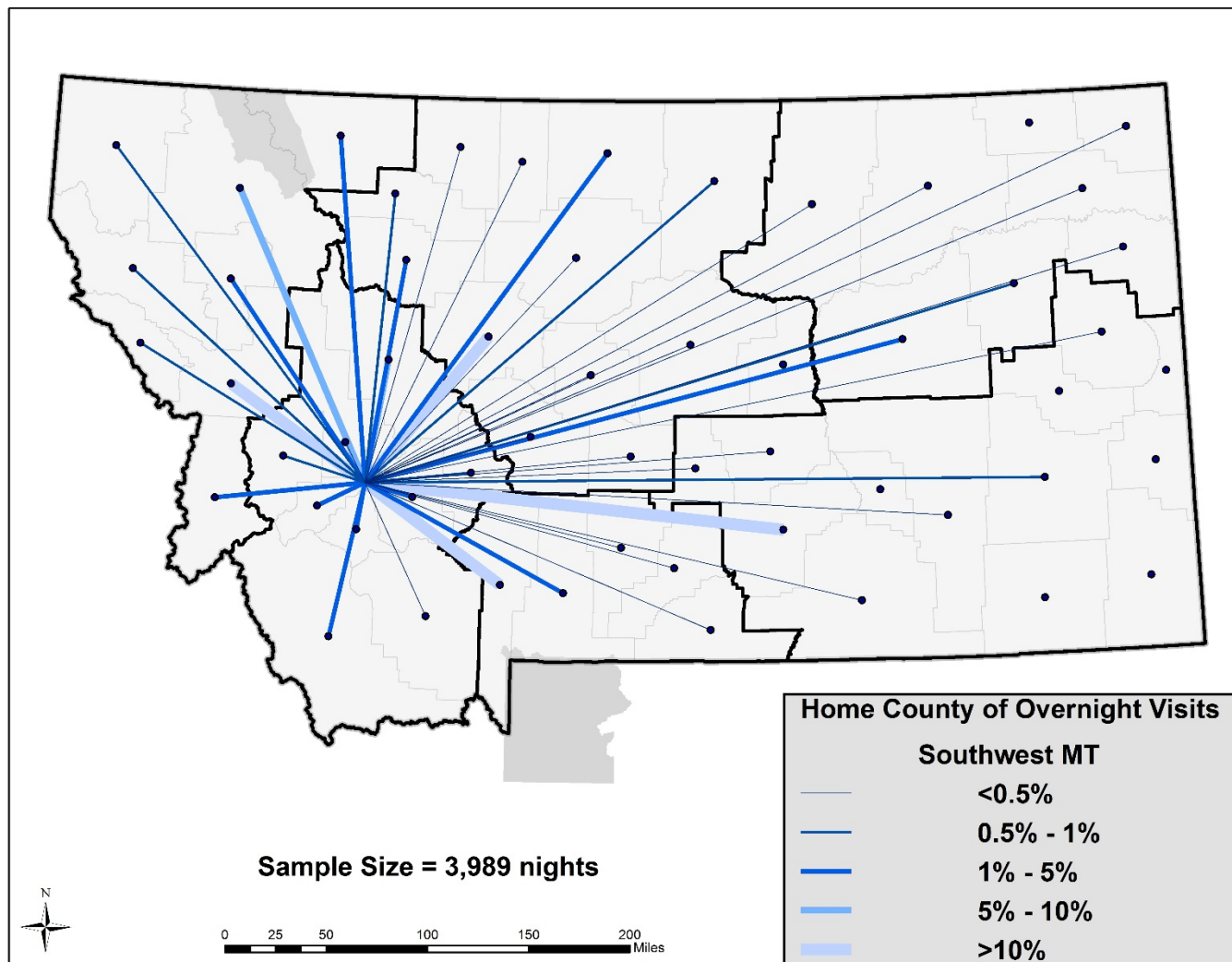
### Education level

|                       |     |                  |     |
|-----------------------|-----|------------------|-----|
| < high school         | 1%  | Undergrad degree | 34% |
| High school or GED    | 20% | Advanced degree  | 23% |
| Associate/trade/Cert. | 22% |                  |     |

### Household Income

|                      |     |                   |     |
|----------------------|-----|-------------------|-----|
| < \$25,000 HH income | 10% | \$100K to <\$150K | 12% |
| \$25K to < \$50K     | 21% | \$150K to <\$200K | 7%  |
| \$50K to < \$75K     | 27% | \$200K +          | 4%  |
| \$75K to < \$100K    | 21% |                   |     |

## Origins of residents who visited Southwest Montana Travel Region for OVERNIGHT TRIPS



## Percent of total overnight visitors from each county to Southwest Montana Travel Region (top 5 highlighted)

|            |       |               |       |              |       |             |       |
|------------|-------|---------------|-------|--------------|-------|-------------|-------|
| Beaverhead | 1.3%  | Flathead      | 5.8%  | Madison      | 0.9%  | Roosevelt   | 0.4%  |
| Big Horn   | 0.1%  | Gallatin      | 11.8% | Meagher      | 0.1%  | Rosebud     | 0.4%  |
| Blaine     | 0.8%  | Garfield      | 1.4%  | Mineral      | 0.6%  | Sanders     | 0.6%  |
| Broadwater | 0.7%  | Glacier       | 1.3%  | Missoula     | 21.1% | Sheridan    | 0.1%  |
| Carbon     | 0.4%  | Golden Valley | 0.0%  | Musselshell  | 0.1%  | Silver Bow  | 4.5%  |
| Carter     | 0.0%  | Granite       | 0.5%  | Park         | 1.0%  | Stillwater  | 0.4%  |
| Cascade    | 11.8% | Hill          | 1.3%  | Petroleum    | 0.0%  | Sweet Grass | 0.1%  |
| Choteau    | 0.3%  | Jefferson     | 1.8%  | Phillips     | 0.2%  | Teton       | 2.0%  |
| Custer     | 0.7%  | Judith Basin  | 0.2%  | Pondera      | 0.5%  | Toole       | 0.2%  |
| Daniels    | 0.0%  | Lake          | 2.8%  | Powder River | 0.0%  | Treasure    | 0.0%  |
| Dawson     | 0.3%  | Lewis & Clark | 7.3%  | Powell       | 0.3%  | Valley      | 0.2%  |
| Deer Lodge | 1.1%  | Liberty       | 0.1%  | Prairie      | 0.0%  | Wheatland   | 0.2%  |
| Fallon     | 0.0%  | Lincoln       | 0.5%  | Ravalli      | 2.9%  | Wibaux      | 0.0%  |
| Fergus     | 0.5%  | McCone        | 0.1%  | Richland     | 0.3%  | Yellowstone | 10.7% |



## Overnight Resident Travel within Yellowstone Travel Region

The purpose of this short summary is to further the understanding of Montana residents who spent time and money in the Yellowstone Country travel region at least 50 miles from their home. Yellowstone Country travel region receives 17% of resident dollars spent in MT and 16% of all resident overnights in MT.

### % of nights for each county within Yellowstone

#### Country travel region:

Carbon 7%; Gallatin 69%; Park 15%; Stillwater 6%; Sweet Grass 3%

### Overnight visitor dollars spent in Yellowstone Country

|                                   | Destination \$       |
|-----------------------------------|----------------------|
| Fuel                              | \$16,526,000         |
| Lodging, camping                  | \$28,038,000         |
| Restaurants, bars                 | \$48,864,000         |
| Groceries                         | \$12,297,000         |
| Retail goods                      | \$27,717,000         |
| Services (fees, admissions, etc.) | \$11,291,000         |
| <b>TOTAL</b>                      | <b>\$144,733,000</b> |

### Type of lodging used on trip (percent of visitors)

|                      |     |              |    |
|----------------------|-----|--------------|----|
| Hotel/motel          | 35% | Rented home  | 8% |
| Bed & Breakfast      | 1%  | Rented room  | 4% |
| Public land camping  | 7%  | Resort/condo | -- |
| Private campground   | 9%  | Guest ranch  | -- |
| Friend/relative home | 27% | Parking lot  | 2% |
| My second Home       | 2%  | Other        | 7% |

### Percent of visitors per month

|          |     |           |     |
|----------|-----|-----------|-----|
| January  | 12% | July      | 7%  |
| February | 14% | August    | 10% |
| March    | 19% | September | 12% |
| April    | 4%  | October   | 3%  |
| May      | 8%  | November  | 3%  |
| June     | 7%  | December  | 2%  |

### Main reason for trip to Yellowstone Country

Business: 12%  
Vacation/recreation/VFR: 86%  
Other type (i.e. shopping, medical): 2%

Average number of adults on trip: 2.13  
Average number of children <18 on trip: 0.45  
Average group size: 2.45

### Activities participated in during their trip in MT

|                    |     |                     |    |
|--------------------|-----|---------------------|----|
| Scenic driving     | 48% | Dino attractions    | 6% |
| Day hiking         | 30% | Birding             | 5% |
| Special dining out | 30% | Rock hounding       | 5% |
| Watching wildlife  | 21% | Performing arts     | 5% |
| Visit hot springs  | 21% | Bicycling           | 4% |
| Nature photography | 20% | Lewis & Clark sites | 4% |
| ski/snowboarding   | 19% | Ghost towns         | 4% |
| Local brewery      | 18% | Hunting             | 3% |
| Car/RV camping     | 17% | Snowmobile          | 3% |
| Historical sites   | 12% | Attend wedding      | 3% |
| Recreational shop  | 11% | Geocaching          | 2% |
| Museums            | 10% | Rafting/floating    | 2% |
| Fly fishing        | 9%  | Snowshoe            | 2% |
| Festival/events    | 8%  | Farmers market      | 2% |
| Sporting events    | 8%  | Local distillery    | 2% |
| Family event       | 8%  | Horseback riding    | 1% |
| Backpacking        | 7%  | Rock climbing       | 1% |
| Other fishing      | 6%  | Golfing             | 1% |
| View art exhibits  | 6%  | Motorcycle touring  | 1% |

### Demographics

Gender: 61% male 39% female  
Average respondent age: 52.77

### % within each age category

|       |     |       |     |       |     |
|-------|-----|-------|-----|-------|-----|
| 18-29 | 6%  | 40-49 | 12% | 60-69 | 31% |
| 30-39 | 13% | 50-59 | 21% | 70+   | 19% |

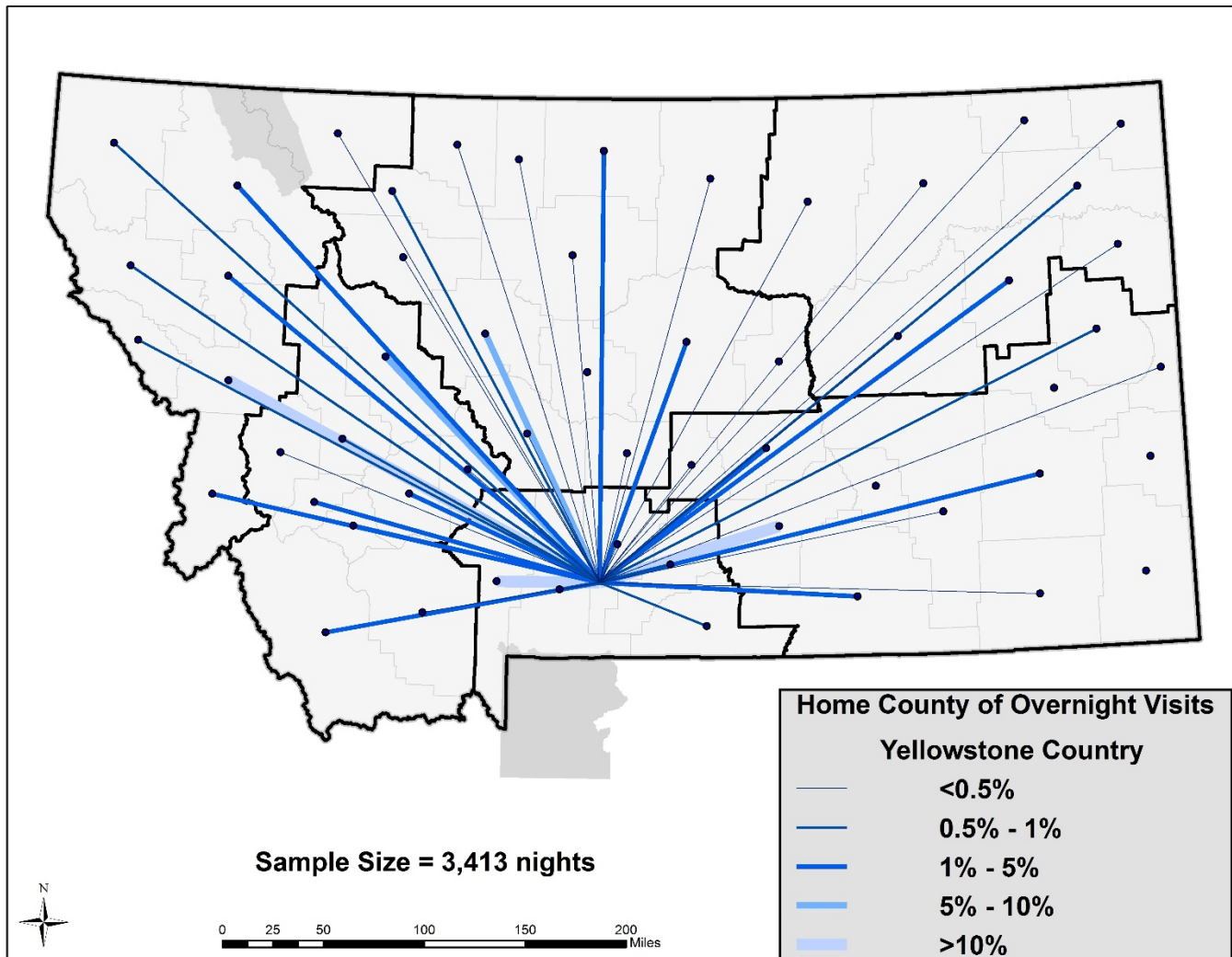
### Education level

|                       |     |                  |     |
|-----------------------|-----|------------------|-----|
| < high school         | --  | Undergrad degree | 38% |
| High school or GED    | 25% | Advanced degree  | 21% |
| Associate/trade/Cert. | 17% |                  |     |

### Household Income

|                      |      |                   |     |
|----------------------|------|-------------------|-----|
| < \$25,000 HH income | 8%   | \$100K to <\$150K | 16% |
| \$25K to < \$50K     | 214% | \$150K to <\$200K | 3%  |
| \$50K to < \$75K     | 31%  | \$200K +          | 7%  |
| \$75K to < \$100K    | 21%  |                   |     |

## Origins of residents who visited Yellowstone Country Travel Region for OVERNIGHT TRIPS



## Percent of total overnight visitors from each county to Yellowstone Country Travel Region (top 5 highlighted)

|            |      |               |       |              |       |             |       |
|------------|------|---------------|-------|--------------|-------|-------------|-------|
| Beaverhead | 1.3% | Flathead      | 4.2%  | Madison      | 1.1%  | Roosevelt   | 0.6%  |
| Big Horn   | 1.3% | Gallatin      | 14.9% | Meagher      | 0.2%  | Rosebud     | 0.3%  |
| Blaine     | 0.1% | Garfield      | 0.1%  | Mineral      | 0.6%  | Sanders     | 0.5%  |
| Broadwater | 0.2% | Glacier       | 0.2%  | Missoula     | 12.0% | Sheridan    | 0.3%  |
| Carbon     | 1.0% | Golden Valley | 0.2%  | Musselshell  | 1.7%  | Silver Bow  | 2.8%  |
| Carter     | 0.0% | Granite       | 0.3%  | Park         | 0.8%  | Stillwater  | 0.7%  |
| Cascade    | 5.9% | Hill          | 1.1%  | Petroleum    | 0.0%  | Sweet Grass | 0.2%  |
| Choteau    | 0.0% | Jefferson     | 3.1%  | Phillips     | 0.1%  | Teton       | 0.4%  |
| Custer     | 2.4% | Judith Basin  | 0.0%  | Pondera      | 0.6%  | Toole       | 0.3%  |
| Daniels    | 0.1% | Lake          | 2.0%  | Powder River | 0.1%  | Treasure    | 0.0%  |
| Dawson     | 0.9% | Lewis & Clark | 8.3%  | Powell       | 0.8%  | Valley      | 0.4%  |
| Deer Lodge | 1.3% | Liberty       | 0.0%  | Prairie      | 0.0%  | Wheatland   | 0.1%  |
| Fallon     | 0.0% | Lincoln       | 0.6%  | Ravalli      | 3.4%  | Wibaux      | 0.1%  |
| Fergus     | 1.4% | McCone        | 0.1%  | Richland     | 0.5%  | Yellowstone | 20.1% |

## Overnight Resident Travel within Central MT Travel Region

The purpose of this short summary is to further the understanding of Montana residents who spent time and money in the Central MT travel region at least 50 miles from their home. Central MT travel region receives 15% of resident spending in Montana and 15% of all resident overnights in MT.

### % of nights for each county within Central MT region:

Blaine 2%; Cascade 50%; Chouteau 3%; Hill 11%; Judith Basin 2%; Liberty 1%; Meagher 7%; Petroleum <1%; Pondera 3%; Teton 2%; Toole 7%; Wheatland 1%

### Overnight visitor dollars spent in Central MT region

|                                   | Destination \$       |
|-----------------------------------|----------------------|
| Fuel                              | \$14,609,000         |
| Lodging, camping                  | \$24,785,000         |
| Restaurants, bars                 | \$43,195,000         |
| Groceries                         | \$10,871,000         |
| Retail goods                      | \$24,502,000         |
| Services (fees, admissions, etc.) | \$9,981,000          |
| <b>TOTAL</b>                      | <b>\$127,943,000</b> |

### Type of lodging used on trip (percent of visitors)

|                      |     |              |     |
|----------------------|-----|--------------|-----|
| Hotel/motel          | 40% | Rented home  | 2%  |
| Bed & Breakfast      | --  | Rented room  | --  |
| Public land camping  | 13% | Resort/condo | <1% |
| Private campground   | 4%  | Guest ranch  | --  |
| Friend/relative home | 34% | Parking lot  | 1%  |
| My second Home       | 2%  | Other        | 4%  |

### Percent of visitors per month

|          |     |           |     |
|----------|-----|-----------|-----|
| January  | 12% | July      | 10% |
| February | 11% | August    | 10% |
| March    | 18% | September | 5%  |
| April    | 10% | October   | 10% |
| May      | 1%  | November  | 7%  |
| June     | 3%  | December  | 4%  |

### Main reason for trip to Central MT region

Business: 20%  
 Vacation/recreation/VFR: 78%  
 Other type (i.e. shopping, medical): 2%

Average number of adults on trip: 2.01  
 Average number of children <18 on trip: 0.46  
 Average group size: 2.45

### Activities participated in during their trip in MT

|                    |     |                     |    |
|--------------------|-----|---------------------|----|
| Recreational shop  | 25% | Visit Indian Res.   | 5% |
| Scenic driving     | 24% | Museums             | 5% |
| Sporting events    | 18% | Horseback riding    | 4% |
| Special dining out | 17% | Birding             | 4% |
| Car/RV camping     | 16% | Motor boating       | 4% |
| Family event       | 15% | Canoe/kayaking      | 4% |
| Historical sites   | 13% | Fly fishing         | 4% |
| Day hiking         | 12% | Ice fishing         | 3% |
| Hunting            | 12% | View art exhibits   | 3% |
| Nature photography | 11% | Ghost towns         | 3% |
| Watching wildlife  | 11% | Backpacking         | 2% |
| Other fishing      | 11% | Rock hounding       | 2% |
| OHV/ATV            | 9%  | Lewis & Clark sites | 2% |
| Local brewery      | 9%  | Local distillery    | 2% |
| Festival/events    | 8%  | Rock climbing       | 1% |
| Snowmobile         | 6%  | Mt. biking          | 1% |
| Performing arts    | 6%  | Golfing             | 1% |
| Dino attractions   | 6%  | Motorcycle tour     | 1% |
| Visit hot springs  | 5%  | Rafting/floating    | 1% |
| Farmers market     | 5%  |                     |    |

### Demographics

Gender: 55% male 45% female  
 Average respondent age: 52.66

### % within each age category

|       |     |       |     |       |     |
|-------|-----|-------|-----|-------|-----|
| 18-29 | 2%  | 40-49 | 16% | 60-69 | 18% |
| 30-39 | 18% | 50-59 | 39% | 70+   | 8%  |

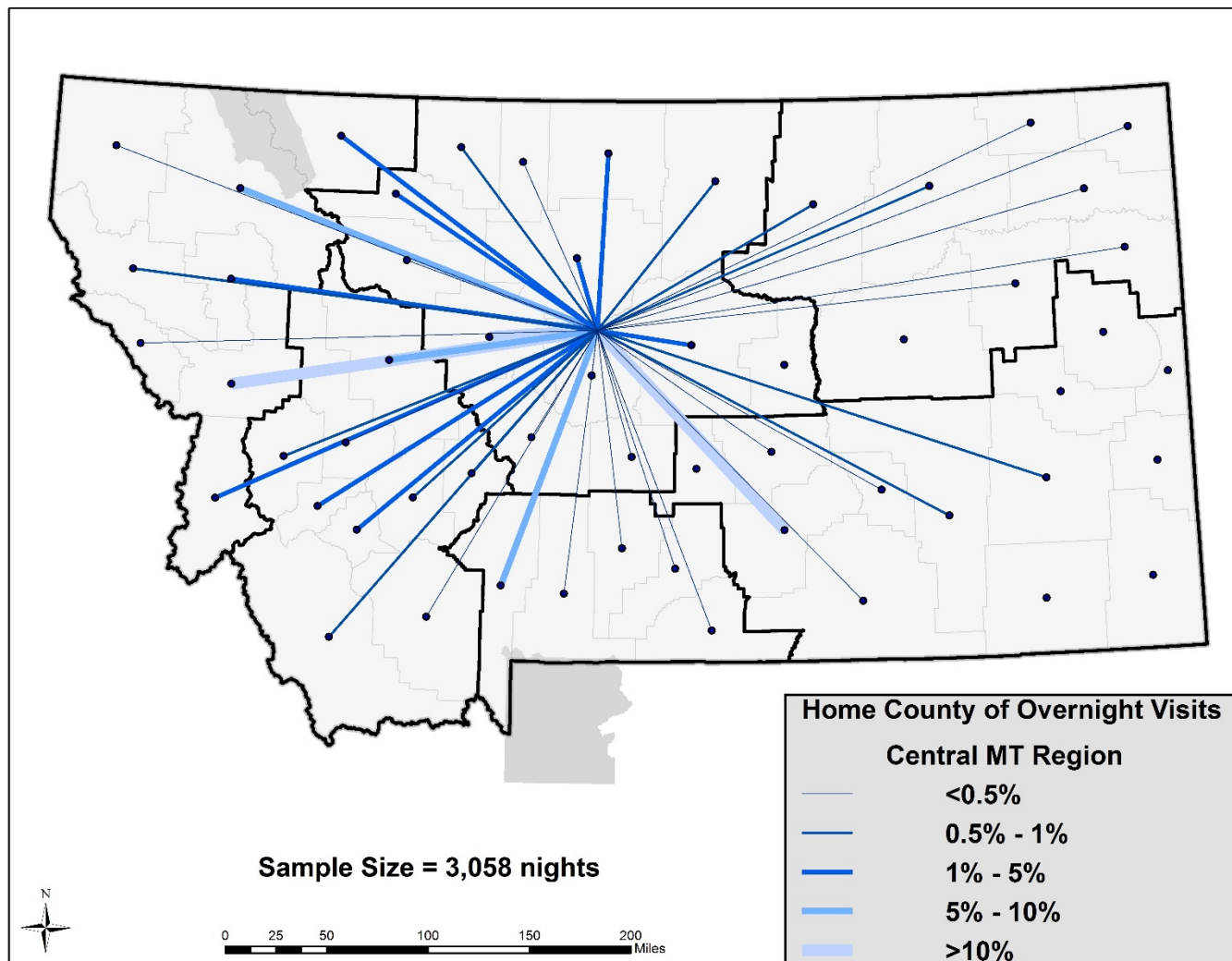
### Education level

|                       |     |                  |     |
|-----------------------|-----|------------------|-----|
| < high school         | 2%  | Undergrad degree | 30% |
| High school or GED    | 27% | Advanced degree  | 19% |
| Associate/trade/Cert. | 22% |                  |     |

### Household Income

|                      |     |                   |     |
|----------------------|-----|-------------------|-----|
| < \$25,000 HH income | 10% | \$100K to <\$150K | 14% |
| \$25K to < \$50K     | 18% | \$150K to <\$200K | 3%  |
| \$50K to < \$75K     | 22% | \$200K +          | <1% |
| \$75K to < \$100K    | 33% |                   |     |

## Origins of residents who visited Central Montana Travel Region for OVERNIGHT TRIPS



## Percent of total overnight visitors from each county to Central Montana Travel Region (top 5 highlighted)

|            |       |               |      |              |       |             |       |
|------------|-------|---------------|------|--------------|-------|-------------|-------|
| Beaverhead | 1.0%  | Flathead      | 7.6% | Madison      | 0.2%  | Roosevelt   | 0.4%  |
| Big Horn   | 0.3%  | Gallatin      | 9.5% | Meagher      | 0.0%  | Rosebud     | 0.6%  |
| Blaine     | 1.0%  | Garfield      | 0.0% | Mineral      | 0.5%  | Sanders     | 0.8%  |
| Broadwater | 0.5%  | Glacier       | 2.8% | Missoula     | 10.7% | Sheridan    | 0.1%  |
| Carbon     | 0.3%  | Golden Valley | 0.0% | Musselshell  | 0.2%  | Silver Bow  | 3.1%  |
| Carter     | 0.0%  | Granite       | 0.6% | Park         | 0.4%  | Stillwater  | 0.5%  |
| Cascade    | 16.9% | Hill          | 3.9% | Petroleum    | 0.0%  | Sweet Grass | 0.1%  |
| Choteau    | 1.3%  | Jefferson     | 0.8% | Phillips     | 0.9%  | Teton       | 0.5%  |
| Custer     | 0.8%  | Judith Basin  | 0.1% | Pondera      | 1.2%  | Toole       | 0.7%  |
| Daniels    | 0.1%  | Lake          | 2.3% | Powder River | 0.0%  | Treasure    | 0.3%  |
| Dawson     | 0.0%  | Lewis & Clark | 6.6% | Powell       | 0.3%  | Valley      | 1.0%  |
| Deer Lodge | 1.9%  | Liberty       | 0.3% | Prairie      | 0.0%  | Wheatland   | 0.2%  |
| Fallon     | 0.0%  | Lincoln       | 0.2% | Ravalli      | 1.2%  | Wibaux      | 0.0%  |
| Fergus     | 1.6%  | McCone        | 0.0% | Richland     | 0.3%  | Yellowstone | 15.5% |

## Overnight Resident Travel within Southeast MT Travel Region

The purpose of this short summary is to further the understanding of Montana residents who spent time and money in the Southeast MT travel region at least 50 miles from their home. Southeast MT travel region receives 17% of resident spending in MT and 16% of all resident overnights in MT.

**% of nights for each county within SE MT region:** Big Horn 4%; Carter 1%; Custer 6%; Dawson 4%; Fallon 2%; Golden Valley 1%; Musselshell 1%; Powder River 2%; Prairie 1%; Rosebud 3%; Treasure <1%; Wibaux <1%; Yellowstone 77%

### Overnight visitor dollars in Southeast MT Travel Region

|                                   | Destination \$       |
|-----------------------------------|----------------------|
| Fuel                              | \$16,438,000         |
| Lodging, camping                  | \$27,888,000         |
| Restaurants, bars                 | \$48,602,000         |
| Groceries                         | \$12,232,000         |
| Retail goods                      | \$27,568,000         |
| Services (fees, admissions, etc.) | \$11,231,000         |
| <b>TOTAL</b>                      | <b>\$143,959,000</b> |

### Type of lodging used on trip (percent of visitors)

|                      |     |              |    |
|----------------------|-----|--------------|----|
| Hotel/motel          | 42% | Rented home  | 1% |
| Bed & Breakfast      | 1%  | Rented room  | 1% |
| Public land camping  | 5%  | Resort/condo | -- |
| Private campground   | 7%  | Guest ranch  | -- |
| Friend/relative home | 39% | Parking lot  | 2% |
| My second Home       | 2%  | Other        | -- |

### Percent of visitors per month

|          |     |           |     |
|----------|-----|-----------|-----|
| January  | 6%  | July      | 6%  |
| February | 11% | August    | 10% |
| March    | 13% | September | 11% |
| April    | 7%  | October   | 7%  |
| May      | 6%  | November  | 10% |
| June     | 9%  | December  | 5%  |

### Main reason for trip to Southeast MT Travel Region

Business: 15%  
 Vacation/recreation/VFR: 65%  
 Other type (i.e. shopping, medical): 20%

Average number of adults on trip: 1.90  
 Average number of children <18 on trip: 0.46  
 Average group size: 2.30

### Activities participated in during their trip in MT

|                    |     |                     |    |
|--------------------|-----|---------------------|----|
| Scenic driving     | 25% | Dino attractions    | 4% |
| Recreational shop  | 24% | Motor boating       | 3% |
| Special dining out | 21% | Lewis & Clark sites | 3% |
| Family event       | 14% | Attend wedding      | 3% |
| Day hiking         | 10% | Golfing             | 2% |
| Watching wildlife  | 10% | OHV/ATV             | 2% |
| Festival/events    | 10% | Visit hot springs   | 2% |
| Car/RV camping     | 9%  | Local distillery    | 2% |
| Ice fishing        | 9%  | Performing arts     | 2% |
| Local brewery      | 9%  | Birding             | 1% |
| Nature photography | 8%  | Geocaching          | 1% |
| Hunting            | 8%  | Rock climbing       | 1% |
| Historical sites   | 8%  | Bicycling           | 1% |
| Sporting events    | 8%  | Rock hounding       | 1% |
| Museums            | 7%  | Motorcycle tour     | 1% |
| Other fishing      | 6%  | Canoe/kayaking      | 1% |
| View art exhibits  | 5%  | Fly fishing         | 1% |
| Farmers market     | 5%  | Rafting/floating    | 1% |
| Backpacking        | 4%  | Horseback riding    | 1% |
| Visit Indian Res.  | 4%  | Ghost towns         | 1% |

### Demographics

Gender: 46% male 54% female  
 Average respondent age: 54.89

### % within each age category

|       |     |       |     |       |     |
|-------|-----|-------|-----|-------|-----|
| 18-29 | 5%  | 40-49 | 16% | 60-69 | 31% |
| 30-39 | 12% | 50-59 | 22% | 70+   | 14% |

### Education level

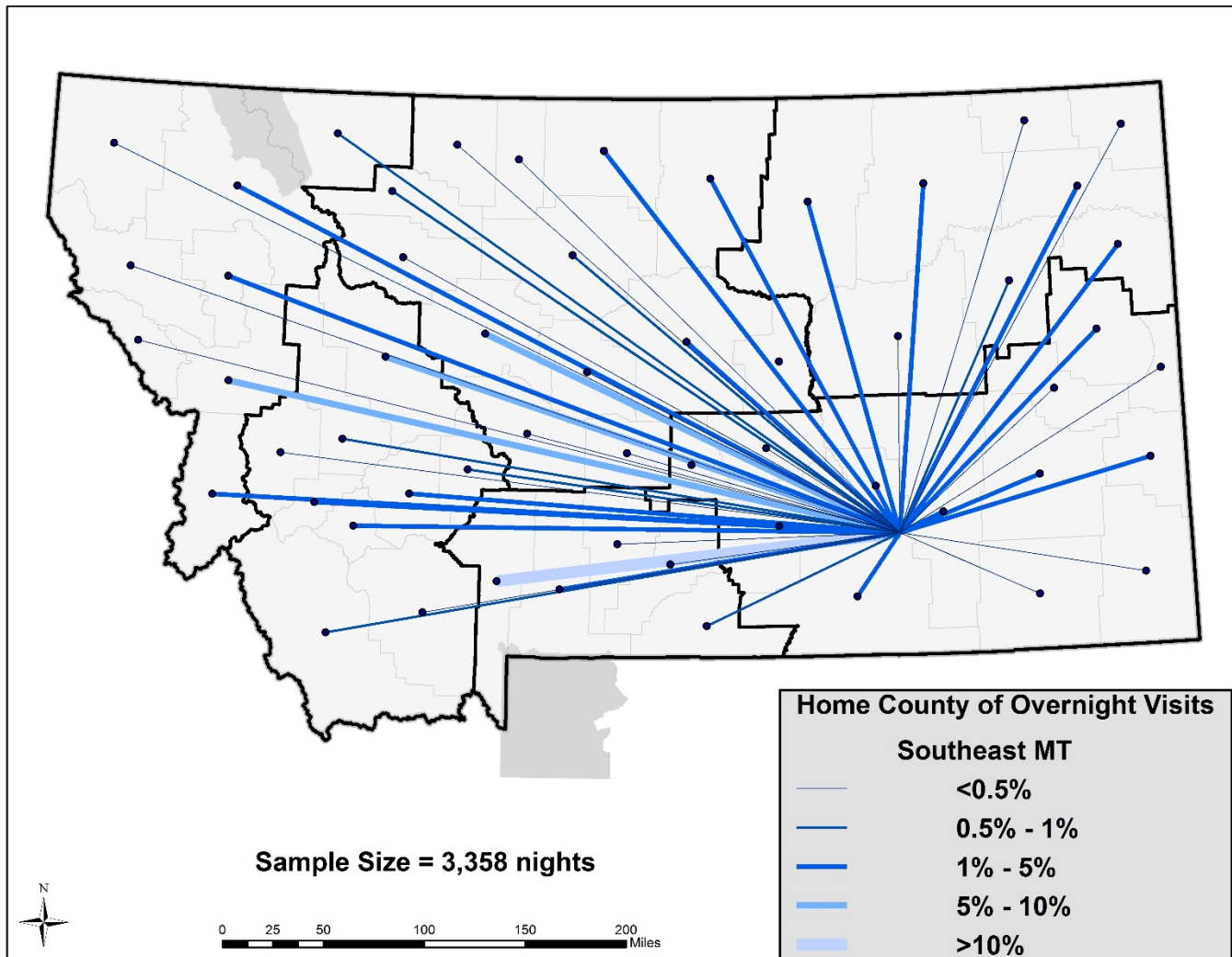
|                       |     |                  |     |
|-----------------------|-----|------------------|-----|
| < high school         | --  | Undergrad degree | 30% |
| High school or GED    | 34% | Advanced degree  | 18% |
| Associate/trade/Cert. | 18% |                  |     |

### Household Income

|                      |     |                   |     |
|----------------------|-----|-------------------|-----|
| < \$25,000 HH income | 10% | \$100K to <\$150K | 13% |
| \$25K to < \$50K     | 26% | \$150K to <\$200K | 4%  |
| \$50K to < \$75K     | 22% | \$200K +          | 2%  |
| \$75K to < \$100K    | 23% |                   |     |



## Origins of residents who visited Southeast Montana Travel Region for OVERNIGHT TRIPS



## Percent of total overnight visitors from each county to Southeast Montana Travel Region (top 5 highlighted)

|            |      |               |       |              |      |             |      |
|------------|------|---------------|-------|--------------|------|-------------|------|
| Beaverhead | 0.5% | Flathead      | 2.7%  | Madison      | 0.8% | Roosevelt   | 3.2% |
| Big Horn   | 1.2% | Gallatin      | 12.0% | Meagher      | 0.3% | Rosebud     | 3.4% |
| Blaine     | 1.2% | Garfield      | 0.5%  | Mineral      | 0.2% | Sanders     | 0.5% |
| Broadwater | 0.5% | Glacier       | 0.6%  | Missoula     | 6.9% | Sheridan    | 0.4% |
| Carbon     | 0.9% | Golden Valley | 0.0%  | Musselshell  | 0.4% | Silver Bow  | 4.0% |
| Carter     | 0.1% | Granite       | 0.1%  | Park         | 1.1% | Stillwater  | 0.3% |
| Cascade    | 9.7% | Hill          | 2.2%  | Petroleum    | 0.0% | Sweet Grass | 0.3% |
| Choteau    | 0.6% | Jefferson     | 1.1%  | Phillips     | 1.1% | Teton       | 0.4% |
| Custer     | 2.9% | Judith Basin  | 0.1%  | Pondera      | 0.8% | Toole       | 0.2% |
| Daniels    | 0.3% | Lake          | 3.0%  | Powder River | 0.5% | Treasure    | 0.0% |
| Dawson     | 2.9% | Lewis & Clark | 9.0%  | Powell       | 0.8% | Valley      | 1.6% |
| Deer Lodge | 1.3% | Liberty       | 0.0%  | Prairie      | 0.4% | Wheatland   | 0.4% |
| Fallon     | 2.6% | Lincoln       | 0.3%  | Ravalli      | 2.2% | Wibaux      | 0.1% |
| Fergus     | 2.4% | McCone        | 0.4%  | Richland     | 2.5% | Yellowstone | 8.0% |

## Overnight Resident Travel within Missouri River Country Travel Region

The purpose of this short summary is to further the understanding of Montana residents who spent time and money in Missouri River Country Travel Region at least 50 miles from their home. Missouri River Country Travel Region receives 4% of resident spending in Montana and 4% of all resident overnights in MT.

**% of nights for each county within Missouri River Country Travel Region:** Daniels 2%; Garfield 3%; McCone 3%; Phillips 16%; Richland 18% Roosevelt 19%; Sheridan 8%; Valley 32%

### Overnight visitor dollars spent in Missouri River County

|                                   | Destination \$      |
|-----------------------------------|---------------------|
| Fuel                              | \$3,539,000         |
| Lodging, camping                  | \$6,004,000         |
| Restaurants, bars                 | \$10,465,000        |
| Groceries                         | \$2,634,000         |
| Retail goods                      | \$5,936,000         |
| Services (fees, admissions, etc.) | \$2,418,000         |
| <b>TOTAL</b>                      | <b>\$30,996,000</b> |

### Type of lodging used on trip (percent of visitors)

|                      |     |              |     |
|----------------------|-----|--------------|-----|
| Hotel/motel          | 32% | Rented home  | 11% |
| Bed & Breakfast      | --  | Rented room  | --  |
| Public land camping  | 15% | Resort/condo | --  |
| Private campground   | 6%  | Guest ranch  | --  |
| Friend/relative home | 33% | Parking lot  | 2%  |
| My second Home       | --  | Other        | 1%  |

### Percent of visitors per month

|          |     |           |     |
|----------|-----|-----------|-----|
| January  | 9%  | July      | 18% |
| February | 6%  | August    | 6%  |
| March    | 4%  | September | 5%  |
| April    | 4%  | October   | 13% |
| May      | 4%  | November  | 6%  |
| June     | 26% | December  | <1% |

### Main reason for trip to Missouri River County

Business: 18%  
 Vacation/recreation/VFR: 79%  
 Other type (i.e. shopping, medical): 4%

Average number of adults on trip: 2.11  
 Average number of children <18 on trip: 0.50  
 Average group size: 2.61

### Activities participated in during their trip in MT

|                    |     |                     |    |
|--------------------|-----|---------------------|----|
| Other fishing      | 35% | Watching wildlife   | 7% |
| Family event       | 35% | Historical sites    | 7% |
| Scenic driving     | 29% | Local brewery       | 7% |
| Special dining out | 24% | Sporting events     | 7% |
| Car/RV camping     | 20% | Rock hounding       | 6% |
| Motor boating      | 20% | Ice fishing         | 6% |
| Nature photography | 15% | Festival/events     | 6% |
| Hunting            | 12% | View art exhibits   | 5% |
| Museums            | 11% | Dino attractions    | 5% |
| Performing arts    | 10% | OHV/ATV             | 4% |
| Recreational shop  | 9%  | Golfing             | 2% |
| Day hiking         | 8%  | Horseback riding    | 1% |
| Farmers market     | 8%  | Bicycling           | 1% |
| Attend wedding     | 8%  | Lewis & Clark sites | 1% |

### Demographics

Gender: 64% male 36% female  
 Average respondent age: 52.56

### % within each age category

|       |     |       |     |       |     |
|-------|-----|-------|-----|-------|-----|
| 18-29 | 12% | 40-49 | 9%  | 60-69 | 33% |
| 30-39 | 9%  | 50-59 | 31% | 70+   | 5%  |

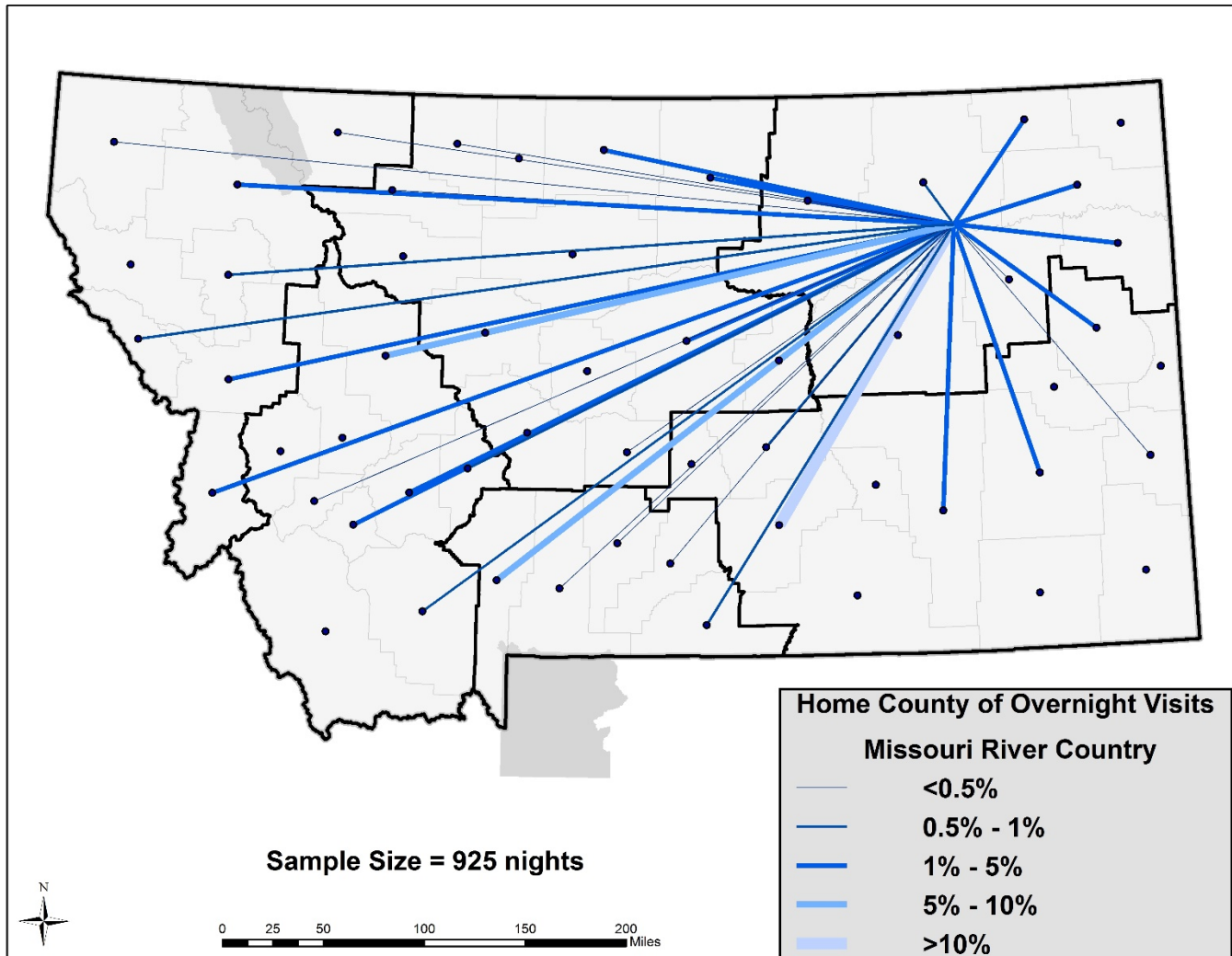
### Education level

|                       |     |                  |     |
|-----------------------|-----|------------------|-----|
| < high school         | --  | Undergrad degree | 39% |
| High school or GED    | 37% | Advanced degree  | 16% |
| Associate/trade/Cert. | 8%  |                  |     |

### Household Income

|                      |     |                   |     |
|----------------------|-----|-------------------|-----|
| < \$25,000 HH income | 19% | \$100K to <\$150K | 14% |
| \$25K to < \$50K     | 17% | \$150K to <\$200K | 1%  |
| \$50K to < \$75K     | 21% | \$200K +          | --  |
| \$75K to < \$100K    | 27% |                   |     |

## Origins of residents who visited Missouri River Travel Region for OVERNIGHT TRIPS



## Percent of total overnight visitors from each county to Missouri River Country Travel Region (top 5 highlighted)

|            |      |               |      |              |      |             |       |
|------------|------|---------------|------|--------------|------|-------------|-------|
| Beaverhead | 0.0% | Flathead      | 4.6% | Madison      | 0.2% | Roosevelt   | 1.1%  |
| Big Horn   | 0.0% | Gallatin      | 8.0% | Meagher      | 0.0% | Rosebud     | 1.2%  |
| Blaine     | 2.2% | Garfield      | 0.0% | Mineral      | 1.0% | Sanders     | 0.0%  |
| Broadwater | 0.6% | Glacier       | 0.2% | Missoula     | 4.8% | Sheridan    | 0.0%  |
| Carbon     | 0.6% | Golden Valley | 0.0% | Musselshell  | 0.5% | Silver Bow  | 1.3%  |
| Carter     | 0.0% | Granite       | 0.0% | Park         | 0.4% | Stillwater  | 0.4%  |
| Cascade    | 9.5% | Hill          | 4.3% | Petroleum    | 0.0% | Sweet Grass | 0.2%  |
| Choteau    | 0.0% | Jefferson     | 2.7% | Phillips     | 1.3% | Teton       | 0.0%  |
| Custer     | 3.0% | Judith Basin  | 0.0% | Pondera      | 0.3% | Toole       | 0.4%  |
| Daniels    | 2.8% | Lake          | 0.8% | Powder River | 0.0% | Treasure    | 0.0%  |
| Dawson     | 3.1% | Lewis & Clark | 7.1% | Powell       | 0.0% | Valley      | 1.0%  |
| Deer Lodge | 0.3% | Liberty       | 0.0% | Prairie      | 0.0% | Wheatland   | 0.3%  |
| Fallon     | 0.4% | Lincoln       | 0.1% | Ravalli      | 1.1% | Wibaux      | 0.0%  |
| Fergus     | 1.5% | McCone        | 1.0% | Richland     | 3.6% | Yellowstone | 27.8% |